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World Poultry and Eggs
Tomatoes for Processing in Selected Countries
Pulses in Selected Countries
Argentine Wheat
Canadian Oilseeds
USSR Corn

Approved by the World Agricultural Outlook Board - USDA

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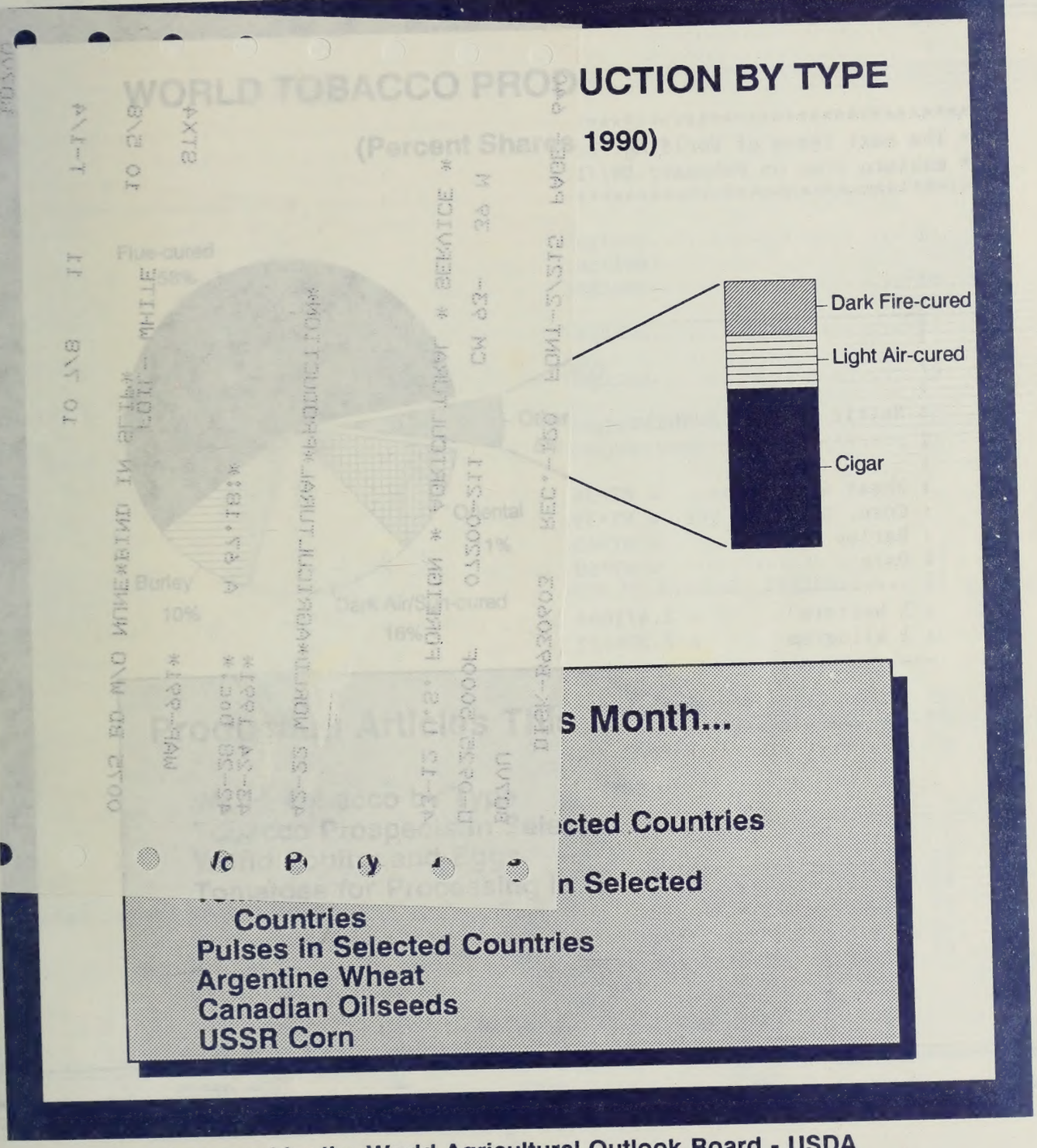

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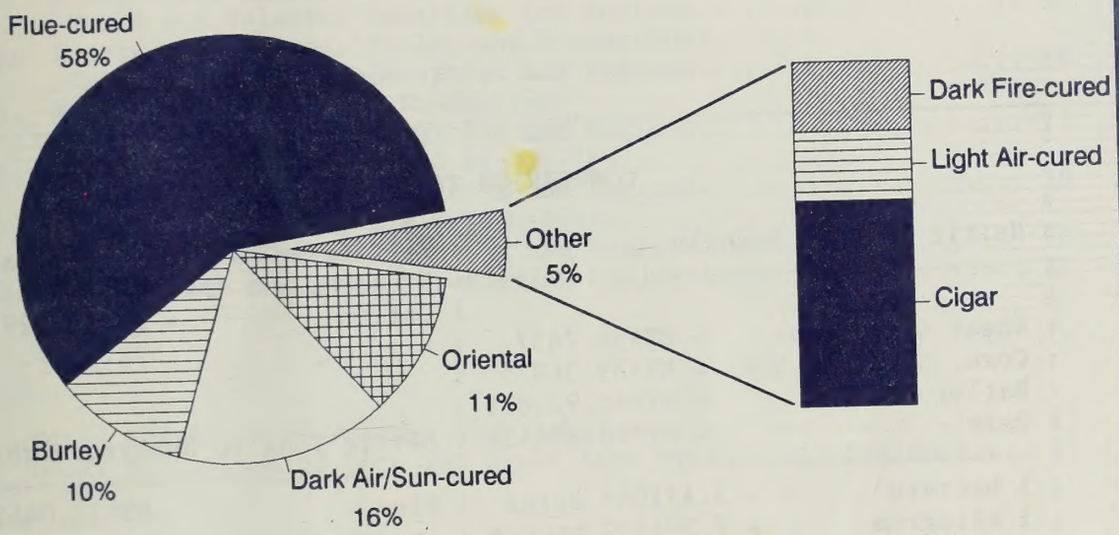

Production Articles This Month...

World Tobacco by Type
Tobacco Prospects in Selected Countries
World Poultry and Eggs
Tomatoes for Processing in Selected Countries
Pulses in Selected Countries
Argentine Wheat
Canadian Oilseeds
USSR Corn

Approved by the World Agricultural Outlook Board - USDA

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-250), January 11, 1991.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 382-8888 or by FAX (202) 447-7729.

****
* The next issue of World Agricultural Production will be released at 3 p.m. *
* eastern time on February 12, 1991. *
****

CONVERSION TABLE

Metric Tons to Bushels		Metric Tons to 480-lb. Bales	
		Cotton	= MT*4.592917
Wheat & Soybeans	= MT*36.7437		
Corn, Sorghum, Rye	= MT*39.36825		
Barley	= MT*45.929625		
Oats	= MT*68.894438	Metric Tons to Hundredweight	
1 hectare	= 2.471044 acres	Rice	=MT*22.04622
1 kilogram	= 2.204622 pounds		

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PRODUCTION HIGHLIGHTS FOR 1990/91

January 1991

WHEAT: World production for 1990/91 is estimated at a record 593.3 million metric tons, down 1.1 million or less than 1 percent from last month, but up 11 percent from last year's harvest. Country highlights are as follows:

- **United States** — Production is estimated at 74.5 million tons, down 0.1 million or less than 1 percent from last month, but up 34 percent from last year. Yield is estimated down slightly.

- **Argentina** — Production is estimated at 11.2 million tons, down 0.8 million tons or 7 percent from last month, but up 10 percent from last year. Estimated yield was reduced due to late spring frosts in southern Buenos Aires province.

- **Brazil** — Production is estimated at 3.2 million tons, down 0.3 million or 9 percent from last month and down 42 percent from last year. Frosts occurred in the main wheat growing states of Parana and Rio Grande do Sul during the cold-sensitive flowering stage, devastating yields. Post-harvest results indicate additional yield losses occurred as a result of excessively wet conditions during harvest in Rio Grande do Sul.

- **Eastern Europe** — Production is estimated at 44.7 million tons, up 0.3 million or 1 percent from last month and up 1 percent from last year. The increase mainly reflects official reports indicating a higher yield in Czechoslovakia.

COARSE GRAINS: World production for 1990/91 is estimated at 824.0 million tons, up 3.3 million or less than 1 percent from last month and up 3 percent from last year. Country highlights are as follows:

- **United States** — Production is estimated at 230.6 million tons, up 0.2 million or less than 1 percent from last month and up 4 percent from last year. Higher estimated sorghum output more than offset reductions for corn, oats, and barley.

- **China** — Production is estimated at a record 104.7 million tons, up 2.0 million or 2 percent from last month and up 11 percent from last year. The increase is due to higher estimated corn yield, particularly in the Northeast.

- **Mexico** — Production is estimated at 16.3 million tons, up 1.3 million or 9 percent from last month and up 16 percent from last year. Estimated corn yield was increased due to beneficial summer rains throughout the Bajio growing region.

- **Brazil** — Production is forecast at 25.9 million tons, up 0.5 million or 2 percent from last month and up 14 percent from last year. Corn area is estimated 7 percent above last year, as farmers have responded to governmental incentives and financial factors that favor corn production over soybeans. Corn yield is estimated to be average, indicating recovery from last year.

- **Eastern Europe** — Production is estimated at 61.4 million tons, up 0.5 million or 1 percent from last month, but down 10 percent from 1989/90. The change largely reflect increases in estimated Czech barley, oats, and rye which more than offset lower estimated Czech corn output.

- **Vietnam** — Production is estimated at 0.9 million tons, up 0.3 million or 42 percent from last month and up marginally from last year. The increase is due to higher estimated corn area and yield.

- **Indonesia** — Production is estimated at 5.3 million tons, up 0.3 million or 6 percent from last month and up 6 percent from last year. An increase in producer prices for corn encouraged farmers to increase corn area.

- **Argentina** — Production is estimated at 9.8 million tons, up 0.3 million or 3 percent from last month and up 18 percent from last year. Beneficial spring rains have improved growing conditions for corn, reportedly the best in the last five years.

- **South Africa** — Production is estimated at 6.8 million tons, down 1.0 million or 13 percent from last month and down 32 percent from last year. Persistent hot, dry weather during planting, especially in the central to western Maize Triangle, has reduced estimated area and yield prospects for corn.

- **EC-12** — Production is estimated at 76.9 million tons, down 0.5 million or 1 percent from last month and down 6 percent from last year. The decrease in estimated French and Greek corn output more than offset an increase in estimated Spanish corn production.

- **Kenya** — Production is estimated at 3.0 million tons, down 0.2 million or 7 percent from last month and down 7 percent from last year. Below normal rainfall reduced both area and yield estimates for corn.

RICE (MILLED-BASIS): World production for 1990/91 is estimated at a record 348.2 million tons, up 0.2 million or less than 1 percent from last month and up 2 percent from the 1989/90 crop. Foreign production in 1990/91 is projected at a record 343.3 million tons. U.S. output is projected at 4.9 million tons, up marginally from last month, but down 4 percent from last year. Country highlights are as follows:

- **Indonesia** — Production is estimated at 29.2 million tons, up 0.4 million or 1 percent from last month and up less than 1 percent from last year. Adequate moisture encouraged increased multiple cropping, resulting in higher estimated rice area.

OILSEEDS: Total world oilseeds production during 1990/91 is forecast at a record 217.15 million tons, up 0.8 million from last month and over 4.8 million or 2 percent above the 1989/90 crop. Foreign production during 1990/91 is projected to be a record 156.6 million tons, up marginally from last month and up 3.4 million or 2 percent from last year. U.S. total oilseed production is estimated at 60.6 million tons, up 0.7 million or 1 percent from last month and up 1.3 million or 2 percent from 1989/90.

* **Soybeans:** World production for 1990/91 is estimated at 105.5 million tons, up 0.3 million from last month, but down 0.6 million or nearly 1 percent from last year. Total foreign soybean output is estimated at 53.2 million tons, down 0.2 million from last month and down 0.5 million or 1 percent from 1989/90. Country highlights are as follows:

  - **United States** — Production is estimated at 52.3 million tons, up 0.5 million or nearly 1 percent from last month, but down slightly from last year. The National Agricultural Statistics Service, USDA, increased its yield estimate.

  - **Argentina** — Production is estimated at 10.3 million tons, down 0.2 million or 2 percent from last month and down 0.5 million or 4 percent from last year. At least 90 percent of the crop is planted and indications are that area is expected to decrease due to weak market prices and lower profit margins.

* **Cottonseed:** World production for 1990/91 is forecast at 34.0 million tons, up 0.5 million or 1 percent from last month, and up 2.6 million or 8 percent from last year. Total foreign production is estimated at 28.5 million tons, up 0.4 million or 1 percent from last month and up 1.3 million or 5 percent above last year. Country highlights are as follows:

- o **United States** Production is estimated at 5.5 million tons, up 0.1 million tons or 1 percent from last month and up 1.3 million or 30 percent from last year. The National Agricultural Statistics Service, USDA, increased harvested area.

- o **Soviet Union** Production is estimated at 5.4 million tons, up 0.5 million from last month and up 2 percent from last year. The U.S. agricultural counselor, Moscow, reports that due to better availability of equipment and fuel for harvest, cottonseed yields have improved. Production estimates for 1988/89 and 1989/90 were also updated.

- o **India** Production is estimated at 4.4 million tons, down 0.1 million or 2 percent from last month and down 3 percent from last year's record crop. Unfavorable harvest conditions, reduced crop area, and losses due to pests have affected the production outlook.

* **Peanuts:** World production for 1990/91 is estimated at 21.4 million tons, up 0.1 million or 1 percent from last month, but down 0.1 million tons from 1989/90. Total foreign production is estimated at 19.8 million tons, up marginally from last month and up 0.1 million tons from 1989/90. Country highlights are as follows:

  - o **United States** Production is estimated at 1.6 million tons, up 0.1 million tons or 4 percent from last month but down 0.2 million or 10 percent from 1989/90. The National Agricultural Statistics Service, USDA, increased both harvested area and yield estimates.

* **Sunfloverseed:** World production for 1990/91 is estimated at 21.8 million tons, down 0.1 million or 1 percent from last month and down slightly from last year. Total foreign production was reduced to 20.8 million tons, down 0.2 million or 1 percent from last month and down 0.3 million or 1 percent from last year. Country highlights are as follows:

  - o **United States** Production is estimated at 1.0 million tons, up 0.1 million tons or 8 percent from last month and up 0.2 million or 29 percent from last year.

  - o **Soviet Union** Production is estimated at 6.8 million tons, down 0.2 million from last month and down 0.3 million or 4 percent from last year. The rain delayed harvest reduced area and average yield.

* **Rapeseed:** World production for 1990/91 is estimated at a record 23.8 million tons, down marginally from last month, but up 2.3 million or 10 percent from last year. There were no significant country changes this month.

* **Flaxseed:** World production for 1990/91 is estimated at 2.3 million tons, up marginally from last month and up 0.4 million or 22 percent from last year. Total foreign production is pegged at 2.2 million tons, unchanged from last month, but up 0.4 million or 19 percent from last year. Country highlights are as follows:

  o **United States:** Production for 1990/91 is estimated at 97,000 tons, up 13,000 tons or 15 percent from last month and up 66,000 tons or 214 percent from 1989/90. The National Agricultural Statistics Service, USDA, increased both the harvested area and yield estimate.

* **Copra:** World production for 1990/19 is forecast at 4.9 million tons, unchanged from last month, but up 0.2 million or 4 percent over last year. Copra production reached a record 5.3 million tons in 1985/86. There were no country changes this month.

* **Palm Kernels:** World production for 1990/91 is forecast at a record 3.4 million tons, unchanged from last month and up nearly 2 percent from last year. There were no country changes this month.

* **Palm Oil:** World production for 1990/91 is forecast at a record 11.2 million tons, up marginally from last month, but up 0.3 million or 2 percent from last year. There were no significant country changes this month.

COTTON: World cotton production in 1990/91 is estimated at 86.9 million bales, down 0.3 million bales or less than 1 percent from last month but up 6.9 million bales or 9 percent from last year. Foreign production is estimated at 71.3 million bales, down 0.5 million from last month, but up 3.5 million bales or 5 percent from the 1989/90 estimate. Country highlights are as follows:

  o **United States** Production is estimated at 15.6 million bales, up 0.2 million or 1 percent from last month and up 28 percent from last year. The output increase is due to excellent fall weather, which aided boll maturity and harvest operations.

  o **Egypt** Production is estimated at 1.4 million bales, down 0.1 million or 7 percent from last month, but up 4 percent from last year's reduced crop. Harvest results suggest that late planting, insect damage, and diversion of resources to more lucrative crops reduced area and yield more than expected.

  o **India** Production is estimated at 10.1 million bales, down 0.3 million or 3 percent from last month, and down 3 percent from last year's record crop. Cotton area and average yield are estimated slightly lower than last month because of delays in early-season harvest operations and pest damage to the crop in the northern region.

- <u>Greece</u> — Production is estimated at 1.1 million bales, down 0.1 million or 9 percent from last month and down 10 percent from last year. Estimated yields were lowered from December because recurring rains starting at the end of October stopped late boll opening and harvesting in most areas.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	1990/91	1988/89	1989/90	Dec.	Jan.	1988/89	1989/90	Dec.	Jan.
	--Million Acres--			--Million Acres--			--Bushels per Acre--				--Million Bushels--			
All Wheat	65.5	76.6	77.3	53.2	62.2	69.4	34.1	32.7	39.6	39.5	1,812	2,037	2,744	2,739
Winter	48.8	55.1	57.0	39.8	41.5	50.0	39.2	35.0	40.7	40.7	1,562	1,455	2,036	2,033
Other	16.7	21.5	20.3	13.4	20.7	19.4	18.7	28.1	36.5	36.4	250	582	708	705
Rye	2.4	2.0	1.6	0.6	0.5	0.4	24.7	28.2	27.1	27.1	15	14	10	10
Soybeans	58.8	60.8	57.8	57.4	59.5	56.5	27.0	32.3	33.7	34.0	1,549	1,924	1,904	1,922
Corn	67.7	72.2	74.2	58.3	64.7	67.0	84.6	116.3	119.0	118.5	4,929	7,525	7,935	7,933
Sorghum	10.3	12.6	10.5	9.0	11.1	9.1	63.8	55.4	60.5	62.9	577	615	560	571
Barley	9.8	9.1	8.2	7.6	8.3	7.5	38.0	48.6	55.2	55.9	290	404	419	419
Oats	13.9	12.1	10.4	5.5	6.9	5.9	39.3	54.3	60.2	60.1	218	374	358	357
							--Pounds per Acre--				---Million CWT.---			
Rice	2.9	2.7	2.9	2.9	2.7	2.8	5,514	5,749	5,499	5,507	159.9	154.5	154.4	154.9
											---Million 480-Pound---			
All Cotton	12.5	10.6	12.4	11.9	9.5	11.7	619	614	641	640	15.4	12.2	15.4	15.6

1/ Source: All estimates are provided by the National Agricultural Statistics Service (NASS) of the United States Department of Agriculture, and are published in the Crop Production circular available from NASS.

JANUARY 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			USSR	Asia					South America		Selected Other			All Other Countries
			United States	Canada	Mexico	EC-12	Oth. W. Europe	Eastern Europe		China	India	Indo-nesia	Paki-stan	Thai-land	Argen-tina	Brazil	Aus-tralia	South Africa	Turkey	
	—Million Metric Tons—																			
Wheat																				
1988/89	500.3	451.0	49.3	16.0	3.2	74.7	3.8	44.8	84.4	85.4	46.2	0.0	12.7	0.0	8.4	5.8	14.1	3.5	15.0	16.9
1989/90 prel.	536.7	481.2	55.4	24.6	4.0	78.3	4.4	44.3	92.3	90.8	54.0	0.0	14.4	0.0	10.2	5.6	14.1	2.0	11.5	15.5
1990/91 proj.																				
December	594.3	519.7	74.7	31.8	3.9	80.8	5.0	44.4	108.0	96.5	54.0	0.0	14.3	0.0	12.0	3.5	15.5	1.8	14.0	17.5
January	593.3	518.7	74.5	31.8	3.9	80.7	5.0	44.7	108.0	96.5	54.0	0.0	14.3	0.0	11.2	3.2	15.5	1.8	14.0	17.4
Coarse Grains																				
1988/89	731.6	581.9	149.7	19.7	13.8	88.1	11.4	61.3	97.5	94.2	31.7	5.2	2.4	4.4	7.3	26.7	6.7	13.0	10.0	88.6
1989/90 prel.	799.9	578.6	221.4	23.5	14.1	82.1	12.4	68.1	104.8	94.6	31.2	5.0	2.8	4.2	8.3	22.7	6.9	10.0	7.5	80.4
1990/91 proj.																				
December	820.7	590.3	230.4	26.0	15.0	77.4	13.3	60.9	114.0	102.7	32.3	5.0	2.9	4.0	9.5	25.4	6.9	7.8	8.9	78.3
January	824.0	593.4	230.6	26.0	16.3	76.9	13.3	61.4	114.0	104.7	32.3	5.3	2.9	4.0	9.8	25.9	6.9	6.8	8.9	78.0
Rice (Milled)																				
1988/89	331.0	325.8	5.2	0.0	0.3	1.3	0.0	0.2	1.9	118.4	70.7	27.5	3.2	14.0	0.3	7.5	0.6	0.0	0.2	23.7
1989/90	340.4	335.3	5.1	0.0	0.4	1.4	0.0	0.2	1.7	126.1	70.0	29.1	3.2	13.7	0.2	5.0	0.6	0.0	0.2	23.2
1990/91																				
December	348.0	343.1	4.9	0.0	0.3	1.6	0.0	0.2	1.7	129.5	73.0	28.8	3.5	12.9	0.3	6.7	0.5	0.0	0.2	23.2
January	348.2	343.3	4.9	0.0	0.3	1.6	0.0	0.2	1.7	129.5	73.0	29.2	3.5	12.9	0.3	6.7	0.5	0.0	0.2	23.2
Total Grains 1/																				
1988/89	1,562.9	1,358.7	204.2	35.7	17.2	164.1	15.2	106.2	183.8	298.0	148.6	32.7	18.2	18.5	16.0	40.0	21.4	16.6	25.2	201.5
1989/90 prel.	1,677.0	1,395.1	281.9	48.0	18.5	161.8	16.7	112.6	198.8	311.5	155.2	34.1	20.4	17.9	18.7	33.3	21.7	12.1	19.2	194.7
1990/91 proj.																				
December	1,763.0	1,453.1	309.9	57.8	19.1	159.7	18.3	105.5	223.7	328.7	159.3	33.8	20.7	16.9	21.8	35.6	22.9	9.6	23.1	196.5
January	1,765.4	1,455.4	310.0	57.8	20.4	159.1	18.3	106.3	223.7	330.7	159.3	34.5	20.7	16.9	21.3	35.8	22.9	8.6	23.1	195.9
Oilseeds 2/																				
1988/89	203.5	153.1	50.3	5.9	1.0	11.5	0.6	5.1	13.2	30.6	19.1	2.0	3.2	0.8	10.7	24.6	0.8	0.8	2.3	21.0
1989/90 prel.	212.4	153.1	59.2	4.9	1.4	11.0	0.7	6.0	14.0	28.4	18.6	2.0	3.3	0.9	15.9	20.7	2.4	1.0	2.3	19.6
1990/91 proj.																				
December	216.4	156.5	59.9	5.7	0.9	12.3	0.8	5.3	13.6	32.2	18.8	2.1	3.4	0.7	15.3	19.5	0.9	0.8	2.1	22.0
January	217.1	156.6	60.6	5.7	0.9	12.3	0.8	5.2	13.8	32.2	18.7	2.1	3.4	0.7	15.1	19.5	0.9	0.8	2.1	22.2
	—Million 480-Pound Bales—																			
Cotton																				
1988/89	84.7	69.3	15.4	0.0	1.4	1.6	0.0	0.1	12.7	19.1	8.3	0.0	6.5	0.2	0.9	3.4	1.3	0.4	3.0	10.5
1989/90 prel.	80.0	67.8	12.2	0.0	0.8	1.5	0.0	0.1	12.3	17.4	10.4	0.0	6.7	0.2	1.3	3.0	1.4	0.3	2.8	9.7
1990/91 proj.																				
December	87.2	71.8	15.4	0.0	0.8	1.6	0.0	0.1	12.4	19.3	10.4	0.0	7.0	0.2	1.4	3.4	1.6	0.2	3.0	10.5
January	86.9	71.3	15.6	0.0	0.8	1.5	0.0	0.1	12.4	19.3	10.1	0.0	7.0	0.2	1.4	3.4	1.6	0.2	3.0	10.4

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains and pulses are 195.1 million tons in 1988/89, 210.9 million in 1989/90, and 235.0 million forecast in 1990/91.
2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also include copra and palm kernels for all countries.
Note: Entries of 0.0 indicate no reported or insignificant production.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 3

Wheat Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1988/89	Prel. 1989/90	Proj. 1990/91	1988/89	Prel. 1989/90	1990/91 Proj. Dec.	1990/91 Proj. Jan.	1988/89	Prel. 1989/90	1990/91 Proj. Dec.	1990/91 Proj. Jan.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	218.0	225.5	231.1	2.29	2.38	2.57	2.57	500.3	536.7	594.3	593.3
United States	21.5	25.2	28.1	2.29	2.20	2.66	2.66	49.3	55.4	74.7	74.5
Total Foreign	196.5	200.4	203.0	2.30	2.40	2.56	2.56	451.0	481.2	519.7	518.7
Maj. Foreign Exporters	42.1	44.3	45.6	2.69	2.87	3.07	3.05	113.1	127.2	140.1	139.2
Argentina	4.7	5.5	5.9	1.79	1.86	2.00	1.90	8.4	10.2	12.0	11.2
Australia	8.9	8.9	9.9	1.58	1.58	1.57	1.57	14.1	14.1	15.5	15.5
Canada	13.0	13.6	14.1	1.23	1.80	2.26	2.26	16.0	24.6	31.8	31.8
EC-12	15.5	16.3	15.7	4.82	4.82	5.15	5.12	74.7	78.3	80.8	80.7
Major Importers	95.9	97.2	97.9	2.39	2.50	2.69	2.69	229.3	242.5	263.0	263.1
Brazil	3.5	3.4	3.3	1.68	1.65	1.06	0.97	5.8	5.6	3.5	3.2
China	28.8	29.8	30.3	2.97	3.04	3.18	3.18	85.4	90.8	96.5	96.5
Eastern Europe	10.7	10.6	10.6	4.17	4.16	4.16	4.20	44.8	44.3	44.4	44.7
Egypt	0.6	0.6	0.7	4.76	5.05	5.71	5.71	2.8	3.2	4.0	4.0
Other N. Africa 1/	4.0	4.7	5.2	1.26	1.13	1.08	1.08	5.0	5.3	5.6	5.6
Japan	0.3	0.3	0.3	3.62	3.43	3.77	3.77	1.0	1.0	1.0	1.0
USSR	48.1	47.7	47.5	1.76	1.94	2.27	2.27	84.4	92.3	108.0	108.0
Other Foreign	58.5	58.9	59.5	1.86	1.89	1.96	1.96	108.6	111.6	116.6	116.5
India	23.1	24.1	23.7	2.00	2.24	2.28	2.28	46.2	54.0	54.0	54.0
Iran	6.6	6.0	6.1	1.11	0.97	1.00	1.00	7.3	5.8	6.1	6.1
Mexico	0.8	1.0	0.9	4.00	4.21	4.59	4.59	3.2	4.0	3.9	3.9
Non-EC W. Europe	0.8	0.8	0.9	4.85	5.19	5.46	5.46	3.8	4.4	5.0	5.0
Pakistan	7.3	7.7	7.8	1.73	1.87	1.84	1.84	12.7	14.4	14.3	14.3
South Africa	2.0	1.8	1.7	1.78	1.09	1.06	1.06	3.5	2.0	1.8	1.8
Turkey	8.8	8.7	8.8	1.71	1.32	1.60	1.60	15.0	11.5	14.0	14.0
Others	9.3	8.8	9.7	1.82	1.77	1.79	1.79	16.9	15.5	17.5	17.4

1/ Algeria, Libya, Morocco, and Tunisia.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4

Coarse Grains Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Dec.	Jan.	1988/89	1989/90	Dec.	Jan.
TOTAL COARSE GRAINS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	326.2	322.9	322.0	2.24	2.48	2.55	2.56	731.6	799.9	820.7	824.0
United States	32.8	37.0	36.4	4.56	5.98	6.33	6.34	149.7	221.4	230.4	230.6
Total Foreign	293.4	285.9	285.6	1.98	2.02	2.07	2.08	581.9	578.6	590.3	593.4
Maj. Foreign Exporters	20.7	21.4	20.9	2.47	2.47	2.57	2.56	51.1	53.0	54.3	53.6
Argentina	2.9	3.1	3.4	2.49	2.65	2.85	2.90	7.3	8.3	9.5	9.8
Australia	4.3	4.0	4.4	1.56	1.71	1.58	1.58	6.7	6.9	6.9	6.9
Canada	7.1	8.3	8.0	2.76	2.84	3.24	3.24	19.7	23.5	26.0	26.0
South Africa	4.6	4.4	3.6	2.86	2.27	2.05	1.88	13.0	10.0	7.8	6.8
Thailand	1.8	1.6	1.5	2.50	2.71	2.67	2.67	4.4	4.2	4.0	4.0
Major Importers	106.3	103.7	101.4	2.57	2.73	2.79	2.79	273.4	282.8	282.0	283.3
Eastern Europe	18.2	18.1	18.0	3.37	3.76	3.36	3.42	61.3	68.1	60.9	61.4
EC-12	19.2	18.6	17.7	4.60	4.42	4.37	4.35	88.1	82.1	77.4	76.9
Other W. Europe	3.2	3.1	3.0	3.52	3.97	4.40	4.40	11.4	12.4	13.3	13.3
Mexico	7.5	7.5	8.3	1.85	1.88	1.89	1.96	13.8	14.1	15.0	16.3
USSR	57.8	56.0	54.0	1.69	1.87	2.11	2.11	97.5	104.8	114.0	114.0
Other Major Import. 2/	0.5	0.4	0.4	3.40	3.34	3.34	3.32	1.5	1.4	1.4	1.4
Other Foreign	166.4	160.7	163.3	1.55	1.51	1.56	1.57	257.3	242.8	254.1	256.5
Brazil	13.4	12.7	13.6	2.00	1.80	1.88	1.91	26.7	22.7	25.4	25.9
China	28.3	28.5	29.2	3.33	3.32	3.52	3.59	94.2	94.6	102.7	104.7
India	39.1	38.6	39.4	0.81	0.81	0.82	0.82	31.7	31.2	32.3	32.3
Indonesia	2.9	2.7	2.9	1.82	1.85	1.79	1.83	5.2	5.0	5.0	5.3
Nigeria	10.1	9.9	9.7	0.84	0.82	0.79	0.78	8.5	8.1	7.7	7.6
Philippines	3.8	3.6	3.7	1.21	1.24	1.24	1.24	4.5	4.5	4.6	4.6
Turkey	4.4	4.4	4.5	2.29	1.70	1.99	1.99	10.0	7.5	8.9	8.9
Others	64.6	60.3	60.4	1.18	1.15	1.11	1.11	76.5	69.1	67.5	67.2
BARLEY											
World	78.2	74.9	74.1	2.15	2.26	2.44	2.45	167.8	169.5	180.9	181.6
United States	3.1	3.4	3.0	2.04	2.62	2.97	3.00	6.3	8.8	9.1	9.1
Total Foreign	75.1	71.5	71.0	2.15	2.25	2.41	2.43	161.5	160.7	171.8	172.5
Australia	2.2	2.4	2.5	1.48	1.73	1.55	1.55	3.3	4.1	3.9	3.9
Canada	4.2	4.7	4.6	2.46	2.50	2.93	2.93	10.2	11.7	13.5	13.5
China	3.7	3.3	3.3	1.67	1.74	1.73	1.73	6.2	5.7	5.7	5.7
Eastern Europe	4.5	4.5	4.5	3.77	4.31	4.11	4.33	17.1	19.3	18.9	19.5
EC-12	12.2	11.8	11.4	4.13	3.93	4.00	4.02	50.2	46.2	45.9	46.0
Other W. Europe	1.7	1.5	1.5	3.28	3.87	4.26	4.26	5.7	5.9	6.2	6.2
Turkey	3.3	3.4	3.4	2.12	1.46	1.76	1.76	7.0	4.9	6.0	6.0
USSR	29.7	27.6	26.0	1.50	1.75	2.19	2.19	44.5	48.5	57.0	57.0
Others	13.5	12.5	13.9	1.28	1.16	1.06	1.06	17.3	14.5	14.7	14.7

FOOTNOTES AT END OF TABLE

CONTINUED

TABLE 4 (Continued)

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1988/89	Prel. 1989/90	Proj. 1990/91	1988/89	Prel. 1989/90	1990/91 Proj. Dec.	Jan.	1988/89	Prel. 1989/90	1990/91 Proj. Dec.	Jan.
CORN	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	125.2	126.4	127.6	3.20	3.65	3.67	3.68	400.9	461.3	467.4	469.8
United States	23.6	26.2	27.1	5.31	7.30	7.47	7.44	125.2	191.2	201.6	201.5
Total Foreign	101.6	100.2	100.5	2.71	2.70	2.65	2.67	275.7	270.1	265.8	268.3
Maj. Foreign Exporters	7.1	6.7	6.1	3.05	2.75	2.75	2.70	21.6	18.4	17.2	16.5
Argentina	1.7	1.7	2.0	2.94	3.06	3.33	3.40	5.0	5.2	6.5	6.8
South Africa	3.8	3.6	2.8	3.28	2.56	2.33	2.14	12.4	9.2	7.0	6.0
Thailand	1.6	1.4	1.3	2.63	2.86	2.85	2.85	4.2	4.0	3.7	3.7
Major Importers	22.0	21.2	21.2	3.82	3.96	3.44	3.41	83.9	83.9	71.8	72.3
Eastern Europe	7.1	7.1	6.8	3.78	4.21	3.31	3.31	26.9	29.8	22.9	22.6
EC-12	4.1	3.9	3.4	7.00	6.93	6.43	6.30	28.5	26.9	22.2	21.7
Other W. Europe	0.2	0.2	0.2	8.55	7.68	7.43	7.43	1.9	1.7	1.6	1.6
Mexico	6.0	5.8	6.6	1.68	1.68	1.72	1.82	10.1	9.8	10.7	12.0
USSR	4.4	4.1	4.0	3.62	3.71	3.50	3.50	16.0	15.3	14.0	14.0
Other Maj. Import. 2/	0.1	0.1	0.1	4.20	4.19	4.14	4.14	0.4	0.5	0.5	0.5
Other Foreign	72.6	72.3	73.2	2.34	2.32	2.42	2.45	170.2	167.8	176.8	179.5
Brazil	12.9	12.1	13.0	2.02	1.80	1.88	1.92	26.1	21.8	24.5	25.0
Canada	1.0	1.0	1.0	5.47	6.36	7.00	7.00	5.4	6.4	7.0	7.0
China	19.7	20.4	21.0	3.93	3.88	4.10	4.19	77.4	78.9	86.0	88.0
Egypt	0.8	0.8	0.9	5.20	5.37	5.41	5.41	4.3	4.5	4.6	4.6
India	5.9	6.0	6.0	1.40	1.33	1.33	1.33	8.3	8.0	8.0	8.0
Indonesia	2.9	2.7	2.9	1.82	1.85	1.79	1.83	5.2	5.0	5.0	5.3
Philippines	3.8	3.6	3.7	1.21	1.24	1.24	1.24	4.5	4.5	4.6	4.6
Zimbabwe	1.2	1.2	1.2	1.56	1.67	1.74	1.74	1.9	2.0	2.0	2.0
Others	24.4	24.5	23.6	1.52	1.50	1.49	1.48	37.1	36.7	35.1	35.0
SORGHUM											
World	42.6	41.9	40.7	1.31	1.31	1.32	1.33	55.5	54.9	53.8	53.9
United States	3.7	4.5	3.7	4.00	3.48	3.80	3.95	14.6	15.6	14.2	14.5
Total Foreign	38.9	37.4	37.0	1.05	1.05	1.07	1.06	40.9	39.3	39.5	39.4
Argentina	0.6	0.7	0.7	2.33	2.86	3.00	3.00	1.4	2.0	2.1	2.1
Australia	0.6	0.4	0.6	1.99	2.27	2.00	2.00	1.3	0.9	1.2	1.2
China	1.8	1.8	1.8	3.14	2.94	3.22	3.22	5.6	5.4	5.8	5.8
India	14.8	15.5	15.3	0.71	0.74	0.75	0.75	10.5	11.5	11.5	11.5
Mexico	1.1	1.3	1.3	2.83	2.88	2.85	2.85	3.1	3.8	3.7	3.7
Nigeria	4.4	4.4	4.4	0.80	0.80	0.75	0.75	3.5	3.5	3.3	3.3
South Africa	0.3	0.3	0.3	1.58	1.65	1.65	1.65	0.4	0.5	0.5	0.5
Sudan	5.3	3.1	3.0	0.83	0.52	0.50	0.50	4.4	1.6	1.5	1.5
Thailand	0.2	0.2	0.2	1.35	1.44	1.39	1.39	0.2	0.2	0.3	0.3
Others	9.8	9.7	9.4	1.07	1.02	1.02	1.01	10.4	9.9	9.7	9.6

FOOTNOTES AT END OF TABLE

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4 (Continued)

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Dec.	Jan.	1988/89	1989/90	Dec.	Jan.
OATS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	22.1	22.7	21.6	1.70	1.84	1.98	1.98	37.5	41.7	42.9	42.9
United States	2.2	2.8	2.4	1.41	1.95	2.16	2.16	3.2	5.4	5.2	5.2
Total Foreign	19.9	19.9	19.2	1.73	1.83	1.96	1.96	34.3	36.3	37.7	37.7
USSR	10.9	10.8	10.5	1.40	1.57	1.67	1.67	15.3	16.8	17.5	17.5
Maj. Foreign Exporters	3.5	3.7	3.5	1.91	1.97	2.11	2.11	6.6	7.3	7.3	7.3
Argentina	0.4	0.4	0.5	1.27	1.44	1.33	1.33	0.5	0.6	0.6	0.6
Australia	1.3	1.1	1.2	1.40	1.44	1.38	1.38	1.9	1.6	1.6	1.6
Canada	1.4	1.7	1.5	2.18	2.08	2.33	2.33	3.0	3.5	3.5	3.5
Sweden	0.4	0.4	0.4	3.14	3.54	4.51	4.51	1.3	1.5	1.6	1.6
Other Foreign	5.4	5.4	5.2	2.28	2.24	2.44	2.46	12.4	12.2	12.9	12.9
China	0.6	0.6	0.6	1.19	1.15	1.21	1.21	0.7	0.6	0.7	0.7
Eastern Europe	1.4	1.4	1.3	2.62	2.66	2.80	2.87	3.7	3.6	3.7	3.7
East Germany	0.1	0.1	0.1	3.43	3.33	4.00	4.14	0.5	0.5	0.6	0.6
Poland	0.9	0.8	0.7	2.61	2.72	2.78	2.78	2.2	2.2	2.1	2.1
EC-12	1.8	1.7	1.6	3.11	2.78	3.09	3.10	5.5	4.7	4.9	4.9
France	0.3	0.3	0.2	3.77	3.78	3.80	3.80	1.0	1.0	0.9	0.9
West Germany	0.6	0.5	0.5	4.23	3.78	4.37	4.37	2.4	1.9	2.1	2.1
Finland	0.4	0.4	0.5	2.21	3.24	3.67	3.67	0.9	1.4	1.7	1.7
Norway	0.1	0.1	0.1	3.02	3.13	4.58	4.58	0.4	0.4	0.6	0.6
Others	1.2	1.3	1.2	1.09	1.10	1.11	1.11	1.3	1.4	1.4	1.4
RYE											
World	15.9	16.9	16.8	2.08	2.22	2.31	2.31	33.0	37.6	38.7	38.8
United States	0.2	0.2	0.2	1.55	1.77	1.70	1.70	0.4	0.3	0.3	0.3
Total Foreign	15.6	16.7	16.6	2.09	2.23	2.32	2.32	32.6	37.3	38.4	38.6
USSR	10.1	10.7	10.5	1.83	1.87	2.00	2.00	18.5	20.1	21.0	21.0
Maj. Foreign Exporter											
Canada	0.3	0.5	0.5	1.04	1.74	1.74	1.74	0.3	0.9	0.9	0.9
Other Foreign											
Eastern Europe	3.9	3.9	4.1	2.59	2.99	2.91	2.91	10.0	11.8	11.7	11.9
East Germany	0.6	0.6	0.6	2.94	3.34	3.44	3.19	1.8	2.1	2.1	2.1
Poland	2.9	2.9	3.1	2.52	2.95	2.84	2.84	7.2	8.6	8.7	8.7
Czechoslovakia	0.2	0.2	0.2	3.42	4.05	3.42	4.26	0.5	0.7	0.5	0.7
EC-12	0.9	1.0	1.0	3.05	3.31	3.48	3.46	2.9	3.2	3.4	3.3
Denmark	0.1	0.1	0.1	4.52	4.80	5.09	4.90	0.4	0.5	0.6	0.5
West Germany	0.4	0.4	0.4	4.19	4.69	4.72	4.72	1.6	1.8	2.0	2.0
Others	0.5	0.6	0.6	2.06	2.28	2.51	2.51	1.0	1.3	1.4	1.4

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.
2/ Japan, Republic of Korea, and Taiwan.

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TABLE 5

Rice Area, Yield, and Production
World and Selected Countries and Regions

	AREA			YIELD				PRODUCTION (Rough Basis)				MILLING RATE				PRODUCTION (Milled Basis)			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.			Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Dec.	Jan.	1988/89	1989/90	Dec.	Jan.	1988/89	1989/90	Dec.	Jan.	1988/89	1989/90	Dec.	Jan.
	—Million Hectares—			—Metric Tons Per Hectare—				—Million Metric Tons—				—In Percent—				—Million Metric Tons—			
World	145.6	146.3	146.1	3.4	3.4	3.5	3.5	489.0	502.7	514.0	514.5	67.7	67.7	67.7	67.7	331.0	340.4	348.0	348.2
United States	1.2	1.1	1.1	6.2	6.4	6.2	6.2	7.3	7.0	7.0	7.0	71.5	73.0	70.0	70.0	5.2	5.1	4.9	4.9
Total Foreign	144.5	145.2	145.0	3.3	3.4	3.5	3.5	481.7	495.7	507.0	507.4	67.6	67.6	67.7	67.5	325.8	335.3	343.1	343.3
Maj. Foreign Exporters	16.5	17.0	16.9	2.3	2.3	2.3	2.3	38.6	39.1	38.8	38.8	64.1	64.0	63.9	63.9	24.7	25.0	24.8	24.8
Burma	4.5	4.7	4.9	2.8	2.9	2.9	2.9	12.5	13.5	14.0	14.0	60.0	60.0	60.0	60.0	7.5	8.1	8.4	8.4
Pakistan	2.0	2.1	2.1	2.4	2.3	2.5	2.5	4.8	4.8	5.3	5.3	66.7	66.7	66.7	66.7	3.2	3.2	3.5	3.5
Thailand	9.9	10.2	9.9	2.1	2.0	2.0	2.0	21.3	20.8	19.5	19.5	66.0	66.0	66.0	66.0	14.0	13.7	12.9	12.9
Major Importers	13.0	13.8	13.6	4.3	4.2	4.4	4.3	55.8	58.3	57.9	58.4	66.1	66.0	66.1	66.0	36.9	38.5	38.3	38.5
EC-12	0.3	0.3	0.4	5.6	6.2	6.3	6.3	2.0	2.1	2.3	2.3	67.3	67.0	67.3	67.3	1.3	1.4	1.6	1.6
Indonesia	9.8	10.5	10.3	4.3	4.2	4.5	4.4	42.3	44.7	44.3	45.0	65.0	65.0	65.0	65.0	27.5	29.1	28.8	29.2
Nigeria	0.6	0.6	0.7	1.3	1.4	1.5	1.4	0.8	0.9	1.0	0.9	60.0	60.0	66.5	60.0	0.5	0.5	0.6	0.5
Republic of Korea	1.3	1.3	1.2	6.6	6.5	6.3	6.3	8.4	8.2	7.8	7.8	72.3	72.0	72.0	72.0	6.1	5.9	5.6	5.6
Other Maj. Import. 1/	1.0	1.0	1.0	2.3	2.4	2.3	2.4	2.3	2.5	2.5	2.4	65.4	65.5	65.5	65.6	1.5	1.6	1.6	1.6
Other Foreign	114.9	114.4	114.5	3.4	3.5	3.6	3.6	387.3	398.3	410.3	410.3	68.2	68.2	68.2	68.2	264.1	271.8	280.0	280.0
Australia	0.1	0.1	0.1	8.2	7.8	8.2	8.2	0.8	0.9	0.7	0.7	71.5	71.5	71.5	71.5	0.6	0.6	0.5	0.5
Bangladesh	10.2	10.7	10.6	2.3	2.5	2.5	2.5	23.3	27.0	27.0	27.0	66.7	66.7	66.7	66.7	15.6	18.0	18.0	18.0
Brazil	5.3	4.2	4.8	2.1	1.8	2.0	2.0	11.0	7.4	9.8	9.8	68.0	68.0	68.0	68.0	7.5	5.0	6.7	6.7
China	31.9	32.7	32.4	5.3	5.5	5.7	5.7	169.1	180.1	185.0	185.0	70.0	70.0	70.0	70.0	118.4	126.1	129.5	129.5
India	41.9	41.5	41.8	2.5	2.5	2.6	2.6	106.0	105.0	109.5	109.5	66.7	66.7	66.7	66.7	70.7	70.0	73.0	73.0
Japan	2.1	2.1	2.1	5.9	6.2	6.4	6.4	12.4	12.9	13.2	13.2	72.8	72.8	72.8	72.8	9.0	9.4	9.6	9.6
Philippines	3.5	3.4	3.5	2.6	2.6	2.7	2.7	9.2	8.9	9.4	9.4	65.0	65.0	65.0	65.0	6.0	5.8	6.1	6.1
USSR	0.7	0.7	0.7	4.3	3.9	4.0	4.0	2.9	2.6	2.6	2.6	65.0	65.0	65.0	65.0	1.9	1.7	1.7	1.7
Vietnam	5.8	5.9	5.9	2.9	3.1	3.1	3.1	16.8	18.4	18.0	18.0	65.0	65.0	65.0	65.0	10.9	12.0	11.7	11.7
Others	13.5	13.1	12.8	2.6	2.7	2.7	2.7	35.8	35.1	35.1	35.0	66.2	66.2	66.2	66.2	23.7	23.2	23.2	23.2

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

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TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Dec.	Jan.	1988/89	1989/90	Dec.	Jan.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SOYBEANS											
World	55.79	57.78	54.97	1.71	1.84	1.91	1.92	95.53	106.08	105.15	105.49
United States	23.22	24.09	22.87	1.82	2.17	2.27	2.29	42.15	52.35	51.81	52.30
Total Foreign	32.57	33.69	32.10	1.64	1.59	1.66	1.66	53.38	53.72	53.33	53.18
Maj. Foreign Exporters	16.17	16.33	15.10	1.84	1.84	1.86	1.87	29.70	30.05	28.50	28.30
Argentina	4.00	4.95	4.90	1.63	2.17	2.06	2.10	6.50	10.75	10.50	10.30
Brazil	12.17	11.38	10.20	1.91	1.70	1.76	1.76	23.20	19.30	18.00	18.00
Other Foreign	16.40	17.35	17.00	1.44	1.36	1.47	1.46	23.68	23.67	24.83	24.88
Canada	0.53	0.54	0.50	2.16	2.26	2.63	2.63	1.15	1.22	1.33	1.33
China	8.12	8.06	7.63	1.43	1.27	1.51	1.51	11.65	10.23	11.50	11.50
Eastern Europe	0.56	0.54	0.54	1.20	1.51	1.30	1.31	0.67	0.82	0.70	0.71
EC-12	0.53	0.61	0.66	3.10	3.19	2.83	2.82	1.66	1.95	1.85	1.85
India	1.66	1.90	2.10	0.92	0.89	0.95	0.95	1.53	1.70	2.00	2.00
Indonesia	1.18	1.15	1.25	1.02	0.96	0.96	0.96	1.20	1.10	1.20	1.20
Paraguay	0.85	0.98	0.98	1.90	1.53	1.78	1.63	1.62	1.50	1.60	1.60
USSR	0.76	0.83	0.84	1.16	1.15	1.10	1.10	0.88	0.96	0.92	0.92
Others	2.21	2.74	2.50	1.51	1.53	1.51	1.51	3.33	4.20	3.74	3.77
COTTONSEED											
World	33.76	32.42	33.94	0.98	0.97	0.99	1.00	32.96	31.41	33.53	33.99
United States	4.84	3.86	4.74	1.14	1.10	1.17	1.16	5.50	4.24	5.44	5.52
Total Foreign	28.92	28.56	29.20	0.95	0.95	0.96	0.97	27.46	27.17	28.09	28.47
China	5.53	5.20	5.50	1.27	1.24	1.30	1.30	7.05	6.46	7.14	7.14
India	7.34	7.33	7.70	0.49	0.62	0.58	0.57	3.60	4.54	4.53	4.42
Pakistan	2.51	2.60	2.71	1.14	1.12	1.13	1.13	2.85	2.91	3.06	3.06
USSR	3.43	3.34	3.15	1.61	1.59	1.56	1.71	5.54	5.32	4.93	5.40
Others	10.11	10.09	10.14	0.83	0.79	0.83	0.83	8.42	7.94	8.44	8.45
PEANUTS											
World	19.71	19.35	19.27	1.18	1.11	1.11	1.11	23.18	21.51	21.28	21.43
United States	0.66	0.67	0.73	2.74	2.72	2.18	2.24	1.81	1.81	1.57	1.63
Total Foreign	19.05	18.69	18.54	1.12	1.05	1.07	1.07	21.37	19.70	19.72	19.79
Argentina	0.15	0.18	0.19	1.62	2.06	2.32	2.32	0.24	0.37	0.43	0.43
China	2.91	2.96	3.05	1.95	1.79	1.90	1.90	5.69	5.30	5.80	5.80
India	8.43	8.40	7.90	1.07	0.92	0.92	0.92	9.00	7.70	7.30	7.30
Senegal	0.90	0.78	0.92	0.76	1.04	0.78	0.73	0.69	0.82	0.60	0.67
South Africa	0.15	0.09	0.08	1.07	1.35	1.25	1.25	0.16	0.12	0.10	0.10
Sudan	0.58	0.55	0.54	0.78	0.73	0.60	0.60	0.45	0.40	0.33	0.33
Others	5.92	5.73	5.87	0.87	0.87	0.88	0.88	5.13	5.00	5.16	5.17

CONTINUED

TABLE 6 (Continued)

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Dec.	Jan.	1988/89	1989/90	Dec.	Jan.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SUNFLOWERSEED											
World	14.90	15.72	16.01	1.37	1.39	1.37	1.36	20.36	21.86	21.96	21.81
United States	0.78	0.72	0.75	1.05	1.10	1.27	1.38	0.81	0.80	0.96	1.03
Total Foreign	14.13	15.00	15.26	1.38	1.40	1.37	1.36	19.55	21.06	21.01	20.78
Argentina	2.20	2.80	2.40	1.45	1.36	1.42	1.42	3.20	3.80	3.40	3.40
China	0.83	0.73	0.83	1.42	1.34	1.45	1.45	1.18	0.98	1.20	1.20
EC-12	2.16	2.11	2.55	1.84	1.66	1.60	1.60	3.99	3.50	4.08	4.08
East Europe	1.31	1.29	1.29	1.62	1.87	1.71	1.69	2.13	2.42	2.20	2.18
USSR	4.28	4.46	4.50	1.44	1.59	1.54	1.51	6.16	7.07	7.00	6.80
Others	3.34	3.61	3.69	0.87	0.91	0.84	0.85	2.89	3.29	3.12	3.12
RAPESEED											
World	17.88	16.89	17.50	1.26	1.28	1.36	1.36	22.53	21.56	23.82	23.80
Total Foreign	17.88	16.89	17.50	1.26	1.28	1.36	1.36	22.53	21.56	23.82	23.80
Canada	3.67	2.90	2.63	1.17	1.07	1.26	1.26	4.31	3.10	3.33	3.33
China	4.94	4.99	5.30	1.02	1.09	1.25	1.25	5.04	5.44	6.60	6.60
EC-12	1.84	1.66	1.97	2.81	2.96	2.94	2.92	5.17	4.92	5.74	5.73
East Europe	0.88	1.00	0.94	2.51	2.64	2.39	2.38	2.20	2.64	2.26	2.25
India	4.87	4.70	4.80	0.86	0.81	0.83	0.83	4.20	3.80	4.00	4.00
Others	1.69	1.63	1.86	0.95	1.02	1.02	1.02	1.61	1.67	1.90	1.89
FLAXSEED											
World	3.68	3.67	3.76	0.45	0.52	0.62	0.62	1.66	1.91	2.32	2.33
United States	0.09	0.07	0.10	0.45	0.47	0.89	0.95	0.04	0.03	0.08	0.10
Total Foreign	3.59	3.61	3.66	0.45	0.52	0.61	0.61	1.62	1.88	2.23	2.23
Argentina	0.54	0.58	0.58	0.86	0.90	0.83	0.83	0.46	0.52	0.48	0.48
Canada	0.50	0.60	0.73	0.74	0.83	1.29	1.29	0.37	0.50	0.94	0.94
India	1.18	1.20	1.20	0.30	0.33	0.33	0.33	0.35	0.40	0.40	0.40
USSR	1.04	0.87	0.78	0.21	0.26	0.21	0.21	0.22	0.23	0.17	0.17
Others	0.33	0.36	0.37	0.66	0.66	0.68	0.68	0.22	0.24	0.25	0.25
MAJOR OILSEEDS	*145.71*	*145.83*	*145.44*	*1.35*	*1.40*	*1.43*	*1.44*	*196.22*	*204.33*	*208.06*	*208.84*
United States	29.58	29.41	29.18	1.70	2.01	2.06	2.08	50.31	59.24	59.86	60.58
Total Foreign	116.13	116.42	116.25	1.26	1.25	1.27	1.28	145.91	145.09	148.20	148.26
COPRA	--	--	--	--	--	--	--	4.32	4.67	4.88	4.88
PALM KERNEL	--	--	--	--	--	--	--	2.91	3.37	3.43	3.43
TOTAL OILSEEDS	--	--	--	--	--	--	--	*203.46*	*212.37*	*216.37*	*217.15*
PALM OIL 1/	--	--	--	--	--	--	--	9.47	10.94	11.21	11.21

1/ Not included in total oilseeds.

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TABLE 7

Cotton Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Dec.	Jan.	1988/89	1989/90	Dec.	Jan.
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	33.8	32.0	33.5	545	545	565	565	84.7	80.0	87.2	86.9
United States	4.8	3.9	4.7	694	688	719	718	15.4	12.2	15.4	15.6
Total Foreign	29.0	28.1	28.8	521	525	541	540	69.3	67.8	71.8	71.3
Maj. Foreign Exporters	13.5	13.1	13.2	749	728	764	765	46.5	43.7	46.4	46.3
Australia	0.2	0.2	0.3	1,475	1,406	1290	1,290	1.3	1.4	1.6	1.6
Central America 1/	0.1	0.1	0.1	830	834	825	804	0.4	0.3	0.3	0.3
China	5.5	5.2	5.5	751	728	764	764	19.1	17.4	19.3	19.3
Egypt	0.4	0.4	0.4	718	695	742	729	1.4	1.3	1.5	1.4
Mexico	0.3	0.2	0.2	1,209	891	928	913	1.4	0.8	0.8	0.8
Pakistan	2.5	2.6	2.7	568	560	565	565	6.5	6.7	7.0	7.0
Sudan	0.3	0.3	0.2	443	454	467	535	0.6	0.6	0.5	0.4
Turkey	0.7	0.7	0.7	882	851	976	976	3.0	2.8	3.0	3.0
USSR	3.4	3.3	3.2	805	805	857	857	12.7	12.3	12.4	12.4
Major Importers 2/	0.4	0.4	0.4	837	889	908	853	1.7	1.5	1.6	1.5
Other Foreign	15.0	14.7	15.2	306	335	338	336	21.1	22.6	23.7	23.5
Argentina	0.5	0.6	0.6	389	486	459	459	0.9	1.3	1.4	1.4
Brazil	2.4	2.2	2.0	311	300	370	370	3.4	3.0	3.4	3.4
India	7.3	7.3	7.7	245	310	290	286	8.3	10.4	10.4	10.1
Syria	0.2	0.2	0.2	667	930	872	872	0.5	0.7	0.6	0.6
Others	4.6	4.4	4.7	377	352	369	370	8.1	7.2	7.9	8.0

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

TABLE 8

The table below presents a 9-year record of the difference between the January projections and the final estimates. Using world wheat production as an example, changes between the January projection and the final estimate have averaged 4.2 million tons (0.8 percent) and ranged from -8.3 to 6.4 million tons. The January projection has been below the final 6 times and above the final 3 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 - 1989/90 1/					
	Difference		Lowest	Highest	Below Final	Above Final
	Average	Average	Difference			
	Percent	---Million Metric Tons---			Number of Years 2/	
WHEAT						
World	0.8	4.2	-8.3	6.4	6	3
U.S.	0.1	0.0	-0.1	0.1	4	1
Foreign	1.0	4.2	-8.3	6.4	6	3
COARSE GRAINS 3/						
World	0.8	6.0	-17.9	8.2	4	5
U.S.	0.5	1.1	-4.6	1.3	5	1
Foreign	0.9	5.2	-13.3	8.2	4	5
RICE (Milled)						
World	2.1	6.3	-12.6	1.8	8	1
U.S.	1.4	0.1	-0.2	0.2	3	1
Foreign	2.1	6.3	-12.6	1.8	8	1
SOYBEANS						
World	1.6	1.5	-2.5	2.9	4	5
U.S.	1.7	0.9	-1.1	1.8	3	6
Foreign	3.5	1.4	-2.0	1.7	5	4
		---Million 480-lb. Bales---				
COTTON						
World	1.8	1.5	-5.4	2.5	5	3
U.S.	0.8	0.1	0.1	0.3	2	6
Foreign	2.3	1.5	-5.7	2.4	5	3
UNITED STATES		-------Million Bushels-------				
CORN	0.5	38	-148	38	4	1
SORGHUM	0.9	8	-53	14	1	3
BARLEY	0.5	2	-3	11	5	1
OATS	0.1	0	-2	0	2	0

1/ The final estimate for 1981/82-1988/89 is defined as the first November estimate following the marketing year and for 1989/90 last month's estimate.
2/ May not total nine if projection was the same as the final.
3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

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MAP 1

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

JANUARY 11, 1991

NOAA/USDA JOINT AGRICULTURAL WEATHER FACILITY

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WEATHER BRIEFS

SOUTH AFRICA: MORE RAIN NEEDED IN MAIZE TRIANGLE

The western two-thirds of the Maize Triangle continues to suffer from dry conditions which have had a significant effect on 1991 corn production. Widespread rain, the heaviest precipitation since December 6, 1990, fell across the entire Maize Triangle during January 7 and 9, 1991. Amounts were generally 25-50 millimeters. The rainfall will help, of course, but much of the damage had already occurred. Precipitation was much below normal during October and November across this region. December followed with near normal precipitation in the eastern third of the Maize Triangle, but as little as 50 percent of normal in the western two-thirds. Temperatures during December and early January were about normal in the east and 1-3 degrees above normal in the west. Temperatures moderated in the west during the week of January 6, 1991, to about normal levels.

MEXICO: FLOODS IN NORTHWEST

A portion of northwest Mexico was hit by torrential rains during December 28-29, 1990. Amounts from 75-128 millimeters fell during these two days, overflowing rivers and dams in Sinaloa, southern Sonora, Baja California, and southwestern Chihuahua. The heaviest damage was in Sinaloa, where as much as 100,000 hectares of crops including beans, corn, vegetables, and wheat were reported to be damaged.

AUSTRALIA: HEAVY AND PERSISTENT RAINFALL IN THE EAST

Tropical cyclone Joy lingered off the coast of Queensland and brought heavy rains to northern and eastern Queensland from December 22, 1990 through January 10, 1991. Torrential downpours inundated some regions. Damage has been particularly heavy to sugarcane and cattle. Bananas, macadamia nuts, mangoes, pineapples, and papaws also have suffered. In contrast, rains in amounts of 25-60 millimeters have benefited summer crops of inland Queensland, New South Wales, and Victoria during December 30, 1990, through January 10, 1991. In recent months, precipitation has been below normal in Queensland, New South Wales, and Victoria.

PRODUCTION BRIEFS

PHILIPPINES: POTENTIAL DROUGHT DAMAGE TO CORN CROP

More than 100,000 hectares of 1991/92 corn is being hurt by an ongoing three-week dry spell in Mindanao, according to the U.S. agricultural counselor in Manila. The crop, much of which is at the reproductive stage, represents about one-third of Mindanao's dry season planted area and approximately 8 percent of the country's total January-June harvested area. The first USDA estimates of 1991/92 corn production will be released in May 1991.

FRANCE: SET-ASIDE PROGRAM EXPANDED

France recently modified its cropland set-aside program to increase the number of farmers eligible for higher premiums, according to the U.S. agricultural counselor in Paris. The modifications include reclassifying 21 departments (administrative subdivisions) into higher payment brackets and adding a new high-end payment bracket. Under the reform, farmers in these 21 departments who register for the scheme between July 1990 and June 1991 will have their premiums increased by 300 to 500 French francs (FF) ($58 to $96) per hectare. Total premiums range from FF1,500 to FF3,700 ($288 to $711) per hectare. Although land set-aside is expected to double at the new premium levels, which follow two years of premium increases (25 percent for 1989/90 and 15 percent for 1990/91), French Government agencies and farm groups estimate that participation will still represent less than 3 percent (80,000 hectares) of total French farm land and that crop production will not be significantly reduced.

BOLIVIA: OILSEEDS EXPANDING RAPIDLY

Bolivian farmers are continuing their strong interest in oilseed crops in 1990/91 with an estimated record soybean area of 195,000 hectares, up 13 percent from last year, according to the U.S. agricultural attache in Lima, Peru. Soybean production is pegged at a record 380,000 tons. In addition to soybeans, which accounts for 90 percent of oilseed output, interest in cotton and sunflowers, a new crop for Bolivian farmers, has increased significantly in recent years. Sunflower area doubled between 1989 and 1990, and is expected to climb another 50 percent to 15,000 hectares in 1991. Bolivia's oilseed crushing industry is vigorously supporting the expansion of soybeans and sunflowers in order to diversify its vegetable oil market with a soy-sunflower oil product for both domestic use and export. Total oilseed area is forecast to expand at a pace of nearly 25,000 hectares per year in the short-term. Half this area is expected to be in soybeans and the majority of the remainder is to be in cotton which competes with corn. Sunflowers are seen as becoming more prominent as a rotation crop. Bolivia's oilseed situation will be covered in more detail next month.

ARGENTINA: SUMMER CROP PLANTING PROGRESS

Argentine plantings of 1990/91 oilseed and summer grain crops are nearly complete as of early January, according to the U.S. agricultural counselor in Buenos Aires. Sunflower planting, on less area than in 1989/90, is complete. Soybean planting reached 90 percent, slower than the above-average pace in 1989/90. Corn planting was finished at a faster pace than in 1989/90. Sorghum planting has reached 90 percent complete, slightly slower than last year. Growing conditions are better than in 1989/90 for recently planted summer oilseed and grain crops, with soil moisture reserves fully recharged in most of the important producing areas.

NICARAGUA: SUGAR ESTIMATES LOWERED

Estimates of Nicaraguan sugar production for 1989/90 and 1988/89 have been lowered to 197,000 tons and 157,000 tons respectively, according to the U.S. agricultural attache in San Jose, Costa Rica, after talking with Nicaraguan Government officials. November 1990 estimates had shown 1989/90 sugar production at 250,000 tons and 1988/89 outturn at 225,000 tons. Estimated production for 1990/91 remains unchanged at 250,000 tons. The production increase estimated for 1990/91 reflects an expansion in harvested area of about 5,000 hectares.

NICARAGUA: COFFEE ESTIMATES REDUCED

Nicaraguan 1990/91 coffee production is estimated at 565,000 60-kilogram bags, 60,000 bags under the December forecast and more than 20 percent (175,000 bags) below the 1989/90 harvest, according to the U.S. agricultural attache in San Jose, Costa Rica, after talking with Nicaraguan Government officials. The 1990/91 harvest was revised downward because a June-July drought stressed coffee plants more than had been reported earlier. Coffee outturn for 1989/90 was revised upward from 720,000 to 740,000 bags and 1988/89 production was also revised upward from 692,000 to 715,000 bags.

GUYANA: 1990/91 SUGAR CROP FALLS SHORT

Guyana's 1990/91 sugar production is estimated at 130,000 tons, 35,000 tons less than forecast last November, according to a U.S. Department of State report from Georgetown. This is expected to prevent Guyana from fulfilling its U.S. import quota. The 1990/91 output is the smallest since before 1945 when 157,000 tons was produced. The poor performance of the 1990/91 crop is attributed to inadequate replanting of aging stands which reduced the quality of the cane and the sugar-to-cane ratio. Labor shortages and lack of investment in capital equipment also has played a role in the decline of the industry.

EAST GERMANY: SUGAR PRODUCTION ESTIMATE INCREASED SHARPLY

The harvest of sugarbeets in the five new German states (formerly East Germany) was much better than the results of the two previous years and estimated sugar outturn has been revised to a record 920,000 tons, up from the 850,000 ton estimate in November, according to the U.S. agricultural attache in Berlin. Factors that contributed to the better-than-expected result include better seed that became available from the West German seed companies, higher quality chemicals and better application methods, better harvesting techniques, and better extraction methods. Also this year, the sugarbeet leaves were not used for fodder, so less of the root was lost through topping operations and more was available for sugar extraction.

WEST GERMANY: SUGAR OUTTURN ABOVE EXPECTATIONS

West Germany's sugar production for 1990/91 has been revised upward to a record 3.75 million tons from the December forecast of 3.70 million, according to the U.S. agricultural counselor in Bonn. The production estimate increased because beet yields were even higher than reported earlier. Sugarbeet tonnage was revised upward from 23.0 million to 23.9 million tons.

FEATURE COMMODITY ARTICLES

WORLD UNMANUFACTURED TOBACCO PRODUCTION BY TYPE

World unmanufactured tobacco production for 1990 is estimated at 7.1 million tons, farm sales weight basis, compared to 6.9 million tons forecast last July. Estimated production by leaf type is as follows:

Leaf Type	Revised 1988	Revised 1989	Preliminary 1990
	1000 metric tons		
Flue-cured	3,942	4,145	4,095
Burley	666	692	735
Oriental	790	817	793
Dark air/sun-cured	1,094	1,107	1,097
Light air-cured	96	90	73
Dark air-cured, cigar	207	212	205
Dark fire-cured	53	44	57
Total 1/	6,848	7,108	7,056

1/ Individual types may not add to total due to rounding.

Flue-cured production, estimated at 4.1 million tons, is up less than 1 percent from July, but 1 percent below 1989. The major changes since July are an 8-percent increase in estimated U.S. production due to higher-than-expected yields and to a near doubling in Greece where growers planted more marketable types of tobacco in response to EC reforms. There were small increases in estimates for Canada, Thailand, and Zimbabwe mostly because of higher than expected yields and in the Philippines because of higher plantings. Estimates were cut for South Korea because of wet summer weather, and for Mexico because of problems with the price support program.

Burley production, estimated at 735,000 tons, is up 2 percent from July and up 6 percent from last year Production estimates were increased from July for the two largest producers, the United States and Malawi. In Malawi, estimates for both plantings and yields were increased, resulting in an 19-percent gain in estimated production since July. In the United States estimated burley production is up about 3 percent since July and is 20 percent above last year due to 7-percent larger plantings and higher yields. Compared to 1989, Chinese burley production increased slightly while Brazilian output is estimated down slightly.

Oriental production is estimated up 1 percent from the July forecast but down 3 percent from last year. Output in Turkey, the largest producer was up 19 percent from the July forecast because producers planted more than earlier expected. In Greece, estimated production has been lowered 13 percent since July as a result of production support program reforms that caused smaller than expected plantings. In Yugoslavia, production is estimated down 40 percent from the July forecast because of severe summer drought.

Dark air/sun-cured production, estimated at 1.1 million tons, is up 8 percent from the July forecast, but is still below last year's level. Production in India is estimated at 380,000 tons, 19 percent higher than forecast in July and 5 percent above 1989. The increase since July is because damage from unseasonable rains was not as severe as earlier believed. Estimated Italian production is up nearly 40 percent from the July forecast because failure to establish production regulations before planting time resulted in larger-than-expected plantings.

Arthur Hausamann (382-8883)

TABLE 9

FLUE CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	AREA 1988	AREA 1989	AREA 1990 (FORECAST)	PRODUCTION 1988	PRODUCTION 1989	PRODUCTION 1990 (FORECAST)
	HECTARES			METRIC TONS		
NORTH AMERICA						
Canada	28,607	30,640	27,900	68,521	74,456	64,000
Mexico	7,290	7,012	7,160	13,820	14,410	11,380
United States	148,282	158,116	169,165	368,871	366,668	419,696
REGION TOTAL	184,179	195,768	204,225	451,212	455,534	495,076
SOUTH AMERICA						
Argentina	28,800	31,600	29,500	42,053	48,325	43,600
Brazil	144,000	167,000	157,000	281,000	310,000	295,000
Chile	946	1,102	1,180	2,620	3,071	3,400
Colombia	3,051	3,163	3,351	5,063	5,102	5,751
Ecuador	650	650	650	1,575	1,575	1,575
Peru	1,200	1,200	1,200	1,820	1,820	1,820
Uruguay	665	665	665	1,250	1,250	1,250
Venezuela	5,438	4,997	5,429	8,806	8,350	9,055
REGION TOTAL	184,750	210,377	198,975	344,187	379,493	361,451
CENTRAL AMERICA						
Costa Rica	233	265	250	529	489	540
El Salvador	350	377	395	790	621	703
Guatemala	545	838	868	851	1,357	1,585
Honduras	325	561	624	766	954	1,484
Nicaragua	500	500	500	1,000	1,000	1,000
Panama	100	100	100	180	180	180
REGION TOTAL	2,053	2,641	2,737	4,116	4,601	5,492
CARIBBEAN						
Dominican Rep.	1,259	1,413	1,572	1,763	2,812	3,128
Jamaica and Dep	547	547	547	1,212	1,212	1,212
REGION TOTAL	1,806	1,960	2,119	2,975	4,024	4,340
Morocco	37	34	35	89	79	88
OTHER AFRICA						
Angola	3,200	3,200	3,200	3,200	3,200	3,200
Ethiopia	1,500	1,500	1,500	1,700	1,725	1,750
Ghana	3,950	3,950	3,950	1,825	1,850	1,850
Kenya	6,200	7,600	5,500	6,862	8,492	5,920
Madagascar	750	750	750	1,200	1,200	1,200
Malawi	16,800	16,500	16,500	20,742	19,835	21,818
Mozambique	1,270	1,270	1,270	1,350	1,350	1,350
Nigeria	1,500	1,500	1,100	1,903	1,752	1,752
South Africa	21,087	20,460	20,460	27,875	34,050	28,160
Tanzania	18,218	18,218	18,218	15,000	13,000	11,000
Uganda	1,650	1,350	2,150	1,500	1,200	2,000
Zaire	880	880	880	1,400	1,400	1,400
Zambia	2,850	2,850	2,850	3,500	3,500	3,500
Zimbabwe	59,178	57,660	59,000	119,913	128,555	133,000
REGION TOTAL	139,033	137,688	137,328	207,970	221,109	217,900

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TABLE 9 (Continued)

FLUE CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	AREA 1988	AREA 1989	AREA 1990 (FORECAST)	PRODUCTION 1988	PRODUCTION 1989	PRODUCTION 1990 (FORECAST)
	HECTARES			METRIC TONS		
OTHER ASIA						
Bangladesh	12,000	12,000	12,000	13,000	13,000	13,000
Burma	5,800	5,800	5,800	13,200	13,200	13,200
Cambodia	2,600	2,600	2,600	1,200	1,200	1,200
China	1,304,600	1,510,000	1,400,000	2,340,000	2,443,000	2,355,000
India	67,710	114,310	105,000	59,340	116,210	101,000
Indonesia	82,130	70,000	80,000	54,393	45,500	53,000
Japan	24,004	19,752	19,835	52,670	46,556	46,560
Korea, North	15,100	15,100	15,100	18,400	18,400	18,400
Korea, South	22,952	22,329	22,595	52,196	54,020	48,374
Laos	1,150	1,150	1,150	1,025	1,025	1,025
Malaysia	9,477	12,311	10,000	7,280	13,637	10,500
Pakistan	11,871	10,971	11,650	24,800	23,790	23,300
Philippines	25,700	29,000	29,300	30,720	40,684	41,000
Sri Lanka	6,117	6,117	6,117	4,909	4,909	4,909
Taiwan	8,654	8,019	7,940	20,712	18,986	19,183
Thailand	23,500	23,373	24,775	27,025	29,684	32,500
Vietnam	12,000	12,000	12,000	9,800	9,800	9,800
REGION TOTAL	1,635,365	1,874,832	1,765,862	2,730,670	2,893,601	2,791,951
MIDDLE EAST						
Iran	2,750	2,750	2,750	5,300	5,300	5,300
Jordan	5,800	5,800	5,800	3,960	4,110	4,110
Syria	1,815	1,769	2,100	4,010	3,501	3,990
Turkey	679	710	750	1,494	1,761	2,000
Yemen (Sanaa)	3,322	3,300	3,300	5,600	5,720	5,720
REGION TOTAL	14,366	14,329	14,700	20,364	20,392	21,120
EUROPEAN COMMUNITY						
France	3,013	2,650	2,660	5,570	5,425	4,945
Germany, West	640	713	727	1,123	1,222	1,250
Greece	1,574	3,597	7,600	4,525	8,627	23,497
Italy	21,248	21,850	22,500	42,105	36,685	45,000
Portugal	1,420	1,612	1,646	2,622	4,022	4,100
Spain	7,500	10,500	13,500	10,940	21,300	24,000
REGION TOTAL	35,395	40,922	48,633	66,885	77,281	102,792
EAST EUROPE						
Bulgaria	11,210	7,800	9,500	20,730	11,200	16,500
Czechoslovakia	1,100	1,100	1,100	1,200	1,200	1,200
Germany, East	1,146	1,148	980	1,375	1,285	1,147
Hungary	5,500	5,118	5,160	11,290	10,775	10,800
Poland	17,009	13,531	13,500	33,190	24,000	24,000
Romania	7,900	7,850	7,950	6,800	5,900	6,400
Yugoslavia	15,000	12,000	16,000	21,756	17,205	17,760
REGION TOTAL	59,865	48,547	54,190	96,341	71,565	77,807
OCEANIA						
Australia	5,015	4,771	5,300	13,335	13,296	13,500
New Zealand	683	583	583	1,770	1,520	1,520
REGION TOTAL	5,698	5,354	5,883	15,105	14,816	15,020
OTHER	2,965	2,982	2,982	2,375	2,394	2,394
WORLD	2,265,512	2,535,434	2,437,669	3,942,289	4,144,889	4,095,431

1/ Estimates as of June 1990. 2/ Includes Guyana, Haiti, Trinidad & Tobago, Benin, Mali, Mauritius, Reunion, Sierra Leone, and Cyprus.

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TABLE 10

BURLEY TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	AREA 1988	AREA 1989	AREA 1990 (FORECAST)	PRODUCTION 1988	PRODUCTION 1989	PRODUCTION 1990 (FORECAST)
	HECTARES			METRIC TONS		
NORTH AMERICA						
Mexico	20,922	13,584	10,917	33,770	26,180	18,013
United States	91,624	98,888	106,558	216,460	218,893	262,360
REGION TOTAL	112,546	112,472	117,475	250,230	245,073	280,373
SOUTH AMERICA						
Argentina	12,800	13,100	12,200	14,795	20,190	17,450
Brazil	33,000	37,000	35,000	54,000	59,000	57,000
Chile	1,928	2,154	2,530	6,923	7,629	9,135
Colombia	1,863	1,978	2,200	3,033	3,082	3,333
Ecuador	840	700	700	2,010	1,700	1,700
Paraguay	55	40	40	70	45	45
Peru	400	400	400	380	380	380
Uruguay	65	65	65	50	50	50
Venezuela	3,361	2,920	3,127	5,722	5,140	5,492
REGION TOTAL	54,312	58,357	56,262	86,983	97,216	94,585
CENTRAL AMERICA						
Costa Rica	134	148	150	201	266	240
El Salvador	270	167	167	619	349	353
Guatemala	4,349	5,278	5,452	7,837	10,086	9,644
Honduras	1,177	1,300	1,208	1,531	1,729	1,694
Nicaragua	1,150	1,150	1,150	2,300	2,300	2,300
Panama	380	380	380	1,000	1,000	1,000
REGION TOTAL	7,460	8,423	8,507	13,488	15,730	15,231
DOMINICAN REP.	648	962	1,057	722	1,641	1,800
NORTH AFRICA						
Libya	360	360	360	859	859	859
Morocco	4,660	5,323	5,700	5,964	6,030	6,800
Tunisia	4,900	4,910	5,000	4,460	4,470	4,520
REGION TOTAL	9,920	10,593	11,060	11,283	11,359	12,179
OTHER AFRICA						
Angola	250	250	250	200	200	200
Kenya	130	235	250	164	288	278
Madagascar	2,150	2,150	2,150	1,545	1,545	1,545
Malawi	41,400	52,000	53,000	45,603	61,212	64,019
Mozambique	950	950	950	1,150	1,150	1,150
South Africa	222	285	109	148	174	135
Swaziland	100	100	100	100	100	100
Tanzania	200	D	D	55	D	0
Zaire	650	650	650	660	660	660
Zambia	650	650	650	800	800	800
Zimbabwe	2,253	2,648	3,030	3,734	5,207	5,893
REGION TOTAL	48,955	59,918	61,139	54,159	71,336	74,780

January 1991 Production Estimates and Crop Assessment Division

TABLE 10 (Continued)

BURLEY TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA--- 1988	1989	1990 (FORECAST)	---PRODUCTION--- 1988	1989	1990 (FORECAST)
	----------HECTARES----------			----------METRIC TONS----------		
OTHER ASIA						
Bangladesh	350	350	350	280	280	280
China	36,500	41,400	43,000	50,000	55,000	60,000
India	2,330	2,865	6,950	1,530	2,560	4,730
Indonesia	25	35	40	31	44	50
Japan	13,108	9,040	8,897	23,520	23,695	23,700
Korea, South	8,869	8,656	8,744	20,802	24,402	21,699
Malaysia	155	170	300	200	240	450
Pakistan	203	270	384	400	530	750
Philippines	9,180	9,000	8,500	21,590	19,300	17,000
Sri Lanka	843	843	843	1,347	1,347	1,347
Thailand	6,612	6,848	8,200	15,517	16,765	20,500
REGION TOTAL	78,175	79,477	86,208	135,217	144,163	150,506
MIDDLE EAST						
Syria	1,865	3,579	1,800	3,948	3,105	3,600
Turkey	52	55	60	113	116	120
REGION TOTAL	1,917	3,634	1,860	4,061	3,221	3,720
EUROPEAN COMMUNITY						
France	1,140	1,190	1,365	2,583	3,098	3,192
Germany, West	1,176	1,280	1,254	2,950	2,926	3,050
Greece	3,300	1,732	1,800	9,553	4,062	4,147
Italy	13,883	12,960	16,500	37,928	39,134	46,000
Portugal	533	464	573	1,528	1,450	1,790
Spain	16,300	16,000	9,200	22,720	23,200	16,300
REGION TOTAL	36,332	33,626	30,692	77,262	73,870	74,479
Switzerland	685	675	670	1,750	1,620	1,500
EAST EUROPE						
Bulgaria	4,000	3,200	4,000	5,700	4,000	5,500
Czechoslovakia	400	400	400	500	500	500
Germany, East	1,772	1,850	1,360	2,645	3,000	2,180
Hungary	250	182	180	460	310	310
Poland	2,495	2,347	2,400	4,590	3,500	3,800
Romania	9,875	9,700	10,000	9,350	9,225	9,600
Yugoslavia	4,000	3,000	2,000	6,660	4,995	3,330
REGION TOTAL	22,792	20,679	20,340	29,905	25,530	25,220
New Zealand	17	17	17	30	30	30
OTHER 2/	579	576	556	847	794	767
WORLD	374,338	389,409	395,843	665,937	691,583	735,170

1/ Estimates as of June 1990. 2/ Includes Haiti and Austria.

January 1991 Production Estimates and Crop Assessment Division

TABLE 11

ORIENTAL TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	AREA 1988	AREA 1989	AREA 1990 (FORECAST)	PRODUCTION 1988	PRODUCTION 1989	PRODUCTION 1990 (FORECAST)
	HECTARES			METRIC TONS		
NORTH, SOUTH & Cent America						
Mexico	1050	0	310	2060	0	210
Chile	90	100	89	166	161	150
Guatemala	70	143	160	64	166	138
Honduras	38	22	33	37	22	28
Panama	40	40	40	9	9	9
REGION TOTAL	1288	305	632	2336	358	535
Libya	240	240	240	58	58	58
OTHER AFRICA						
Ethiopia	1,500	1,500	1,500	1,700	1,725	1,750
Malawi	350	600	700	161	296	280
South Africa	1,129	1,015	964	630	575	627
Zimbabwe	132	200	370	24	38	44
REGION TOTAL	3,111	3,315	3,534	2,515	2,634	2,701
OTHER ASIA						
China	2,750	3,100	3,250	5,500	6,150	6,500
Pakistan	9,856	11,321	11,000	18,100	21,000	20,500
Philippines	142	150	150	142	146	150
Thailand	6,390	8,500	12,800	5,569	8,791	13,810
REGION TOTAL	19,138	23,071	27,200	29,311	36,087	40,960
MIDDLE EAST						
Cyprus	17	17	17	11	11	11
Iran	10,470	10,470	10,470	12,000	12,500	12,500
Iraq	2,000	2,000	4,000	2,180	2,180	2,180
Israel	800	400	200	295	280	150
Lebanon	3,750	3,750	3,750	5,000	5,000	5,000
Syria	10,350	6,552	11,350	7,880	4,146	9,120
Turkey	236,100	273,032	260,000	217,143	266,200	250,000
REGION TOTAL	263,487	296,221	289,787	244,509	290,317	278,961
EUROPEAN COMMUNITY						
Greece	82,132	76,142	67,059	120,717	113,014	104,183
Italy	14,960	13,374	13,300	19,854	21,848	20,000
REGION TOTAL	97,092	89,516	80,359	140,571	134,862	124,183
EAST EUROPE						
Bulgaria	72,399	68,000	70,000	89,304	68,000	84,000
Czechoslovakia	900	900	900	1,300	1,300	1,300
Romania	11,850	11,900	12,300	9,500	9,400	9,900
Yugoslavia	32,000	34,000	27,000	28,194	41,070	25,530
REGION TOTAL	117,149	114,800	110,200	128,298	119,770	120,730
USSR	131,500	127,500	120,000	242,000	233,200	225,000
WORLD	633,005	654,968	631,952	789,598	817,286	793,128

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TABLE 12

DARK AIR AND SUN CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	AREA 1988	AREA 1989	AREA 1990 (FORECAST)	PRODUCTION 1988	PRODUCTION 1989	PRODUCTION 1990 (FORECAST)
	HECTARES			METRIC TONS		
NORTH AMERICA						
Canada	445	400	410	1,005	900	825
United States	1,372	1,433	1,497	3,411	2,963	3,465
REGION TOTAL	1,817	1,833	1,907	4,416	3,863	4,290
SOUTH AMERICA						
Argentina	12,800	10,900	6,800	14,263	10,950	5,600
Bolivia	1,250	1,250	1,250	1,250	1,250	1,250
Brazil	76,000	76,000	76,000	65,000	71,000	62,000
Chile	60	67	102	260	244	365
Colombia	14,537	13,640	13,522	21,788	20,435	20,664
Ecuador	325	325	325	450	450	450
Paraguay	5,170	2,700	3,000	7,000	3,500	4,000
Peru	800	800	800	800	800	800
Uruguay	70	70	70	100	100	100
REGION TOTAL	111,012	105,752	101,869	110,911	108,729	95,229
CENTRAL AMERICA						
Panama	20	20	20	18	18	18
CARIBBEAN						
Dominican Rep.	20,921	24,636	11,020	20,272	23,600	13,775
Haiti	100	100	100	200	200	200
St. Vincent	35	35	35	44	43	43
REGION TOTAL	21,056	24,771	11,155	20,516	23,843	14,018
NORTH AFRICA						
Algeria	2,580	2,600	2,700	4,200	4,800	5,000
Libya	300	300	300	533	533	533
Morocco	71	126	100	387	442	400
Tunisia	500	500	500	1,040	1,130	1,130
REGION TOTAL	3,451	3,526	3,600	6,160	6,905	7,063
OTHER AFRICA						
Angola	500	500	500	500	500	500
Benin	66	66	66	133	133	133
Burundi	2,000	2,000	2,000	1,600	1,600	1,600
Congo	2,200	2,200	2,200	750	750	750
Cote D' Ivoire	10,000	10,000	10,000	2,467	2,490	2,490
Madagascar	1,000	1,000	1,000	1,300	1,300	1,300
Malawi	2,200	2,640	4,600	560	372	1,396
Mali	333	333	333	183	183	183
Mozambique	400	400	400	230	230	230
Nigeria	1,000	1,200	1,200	751	1,070	1,070
South Africa	2,120	2,479	2,865	2,540	3,700	4,565
Swaziland	100	100	100	100	100	100
Togo	2,000	2,000	2,000	1,000	1,000	1,000
Zaire	450	450	450	532	532	532
REGION TOTAL	24,369	25,368	27,714	12,646	13,960	15,849

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TABLE 12 (Continued)

DARK AIR AND SUN CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA--- 1988	1989	1990 (FORECAST)	---PRODUCTION--- 1988	1989	1990 (FORECAST)
	----------HECTARES----------			----------METRIC TONS----------		
OTHER ASIA						
Bangladesh	21,515	21,515	21,515	19,685	19,685	19,685
Burma	49,200	49,200	49,200	31,800	31,800	31,800
Cambodia	6,400	6,400	6,400	3,800	3,800	3,800
China	179,000	140,000	140,000	263,000	200,000	200,000
India	245,235	251,625	282,250	302,930	362,130	380,270
Indonesia	149,222	149,894	150,500	69,351	84,170	85,000
Korea, North	15,100	15,100	15,100	18,400	18,400	18,400
Laos	2,850	2,850	2,850	1,975	1,975	1,975
Pakistan	17,605	19,143	18,000	20,390	23,870	22,500
Sri Lanka	1,726	1,726	1,726	1,654	1,654	1,654
Vietnam	20,000	20,000	20,000	18,200	18,200	18,200
REGION TOTAL	707,853	677,453	707,541	751,185	765,684	783,284
MIDDLE EAST						
Iran	4,780	4,780	4,780	7,200	7,200	7,200
Jordan	200	200	200	40	40	40
Oman	1,800	1,800	1,800	2,100	2,000	2,000
Turkey	30	D	D	24	D	D
United Arab Em.	350	350	350	2,000	2,000	2,000
REGION TOTAL	7,160	7,130	7,130	11,364	11,240	11,240
EUROPEAN COMMUNITY						
France	8,517	7,573	6,905	21,204	20,693	18,093
Italy	37,202	41,654	40,900	73,679	91,536	86,000
REGION TOTAL	45,719	49,227	47,805	94,883	112,229	104,093
EAST EUROPE						
Albania	24,000	24,000	24,000	15,000	15,000	15,000
Czechoslovakia	1,350	1,350	1,350	2,500	2,500	2,500
Germany, East	730	658	280	1,362	1,130	470
Hungary	4,150	3,000	3,150	11,050	8,220	5,775
Poland	17,019	9,305	10,000	38,990	20,300	22,000
Romania	9,875	9,550	9,750	13,000	12,900	12,900
REGION TOTAL	57,124	47,863	48,530	81,902	60,050	61,645
OCEANIA						
SOLOMON IS.	100	100	100	96	95	95
WORLD	979,681	943,043	957,371	1,094,097	1,106,616	1,096,824

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TABLE 13

LIGHT AIR CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA--- 1988	1989	1990 (FORECAST)	---PRODUCTION--- 1988	1989	1990 (FORECAST)
	----------HECTARES----------			----------METRIC TONS----------		
NORTH AMERICA						
Mexico	10,303	7,585	2,931	16,570	13,770	4,090
United States	5,059	4,573	4,371	8,367	6,941	7,195
REGION TOTAL	15,362	12,158	7,302	24,937	20,711	11,285
SOUTH AMERICA						
Argentina	713	700	620	983	1,047	855
Brazil	8,000	8,000	8,000	14,000	13,000	13,000
Colombia	724	704	830	1,065	1,016	1,096
Peru	100	100	100	100	100	100
REGION TOTAL	9,537	9,504	9,550	16,148	15,163	15,051
CENTRAL AMERICA						
Costa Rica	416	421	420	861	790	882
Guatemala	220	181	207	198	257	287
Honduras	216	108	128	281	163	172
Nicaragua	140	140	140	300	300	300
REGION TOTAL	992	850	895	1,640	1,510	1,641
OTHER AFRICA						
Cameroon	810	810	810	600	600	600
Congo	1,800	1,800	1,800	1,050	1,050	1,050
Madagascar	2,000	2,000	2,000	1,455	1,455	1,455
Niger	1,000	1,000	1,000	930	930	930
Nigeria	4,000	5,000	5,000	5,267	6,401	6,401
Reunion	100	100	100	105	100	100
South Africa	378	300	438	400	450	460
Zaire	370	370	370	532	532	532
REGION TOTAL	10,458	11,380	11,518	10,339	11,518	11,528
OTHER ASIA						
Bangladesh	6,135	6,135	6,135	6,580	6,580	6,580
India	2,725	6,500	2,800	3,600	10,500	4,000
Japan	3,445	1,869	1,852	9,600	4,146	4,150
Korea	6,800	6,800	6,800	9,200	9,200	9,200
Pakistan	2,064	1,511	1,090	5,840	4,760	3,370
Sri Lanka	3,479	3,479	3,479	1,090	1,090	1,090
REGION TOTAL	24,648	26,294	22,156	35,910	36,276	28,390
MIDDLE EAST						
Syria	325	245	250	216	107	300
EUROPEAN COMMUNITY						
Germany, West	1,268	1,306	1,268	3,017	2,901	3,050
Italy	1,990	1,635	1,300	3,304	2,248	2,000
REGION TOTAL	3,258	2,941	2,568	6,321	5,149	5,050
WORLD	64,580	63,372	54,239	95,511	90,434	73,245

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TABLE 14

DARK AIR CURED TOBACCO, CIGAR
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA--- 1988	1989	1990 (FORECAST)	---PRODUCTION--- 1988	1989	1990 (FORECAST)
	----------HECTARES----------			----------METRIC TONS----------		
NORTH AMERICA						
Canada	140	130	120	250	225	200
Mexico	3,860	3,623	0	7,400	4,400	0
United States	4,775	5,427	6,188	10,148	11,637	13,423
REGION TOTAL	8,775	9,180	6,308	17,798	16,262	13,623
SOUTH AMERICA						
Brazil	6,000	6,000	6,000	5,000	9,000	8,000
Colombia	596	415	371	890	601	525
Ecuador	125	125	125	125	125	125
REGION TOTAL	6,721	6,540	6,496	6,015	9,726	8,650
CENTRAL AMERICA						
Costa Rica	17	17	58	52	22	71
Honduras	584	540	560	1,160	1,378	1,430
Nicaragua	450	450	450	950	950	950
Panama	180	180	180	95	95	95
REGION TOTAL	1,231	1,187	1,248	2,257	2,445	2,546
CARIBBEAN						
Cuba	50,000	49,500	50,000	44,000	44,000	44,000
Jamaica and Dep	628	628	628	1,127	1,127	1,127
St. Vincent	35	35	35	44	42	42
REGION TOTAL	50,663	50,163	50,663	45,171	45,169	45,169
OTHER AFRICA						
Cameroon	2,590	2,590	2,590	4,500	4,900	4,900
Cent. Afr. Rep.	750	750	750	625	650	650
Chad	200	200	200	200	200	200
Uganda	1,650	2,150	2,150	1,500	2,000	2,000
REGION TOTAL	5,190	5,690	5,690	6,825	7,750	7,750
OTHER ASIA						
Bangladesh	14,000	14,000	14,000	12,000	12,000	12,000
China	32,000	32,000	31,000	73,000	73,000	70,800
Indonesia	10,000	13,600	14,000	14,000	20,400	20,000
Philippines	14,435	12,000	12,000	16,350	13,175	13,000
Thailand	19,000	18,000	16,500	10,450	9,540	8,250
REGION TOTAL	89,435	89,600	87,500	125,800	128,115	124,050
EUROPEAN COMMUNITY						
Belgium-Lux	426	425	425	1,647	1,805	1,800
Spain	600	830	520	665	915	790
REGION TOTAL	1,026	1,255	945	2,312	2,720	2,590
EAST EUROPE						
Poland	293	133	150	570	200	250
WORLD	163,334	163,748	159,000	206,748	212,387	204,628

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TABLE 15

DARK FIRE CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	AREA 1988	AREA 1989	AREA 1990 (FORECAST)	PRODUCTION 1988	PRODUCTION 1989	PRODUCTION 1990 (FORECAST)
	HECTARES			METRIC TONS		
NORTH AMERICA						
Mexico	1,470	1,225	587	1,500	1,130	500
United States	5,480	6,111	6,605	13,945	13,119	15,244
REGION TOTAL	6,950	7,336	7,192	15,445	14,249	15,744
SOUTH AMERICA						
Argentina	120	48	40	141	32	34
OTHER AFRICA						
Benin	66	66	66	133	133	133
Kenya	2,000	2,500	3,055	2,170	2,730	3,712
Liberia	10	10	10	10	10	10
Malawi	29,000	17,900	25,400	7,987	4,900	14,000
Mali	333	333	333	183	183	183
Mozambique	80	80	80	170	170	170
Sierra Leone	198	198	198	200	200	200
Tanzania	2,832	2,832	2,832	2,000	2,000	3,000
Togo	2,000	2,000	2,000	1,000	1,000	1,000
Zaire	1,350	1,350	1,350	986	986	986
REGION TOTAL	37,869	27,269	35,324	14,839	12,312	23,394
EUROPEAN COMMUNITY						
Italy	4,527	3,692	3,700	7,485	5,865	6,000
EAST EUROPE						
Poland	4,956	4,113	4,100	15,530	12,000	12,000
WORLD	54,422	42,458	50,356	53,440	44,458	57,172

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TOBACCO PRODUCTION PROSPECTS FOR 1991 IN SELECTED COUNTRIES

Aggregate 1991 tobacco production for 14 selected countries is projected at 1.99 million tons, up 2 percent from the 1990 total. Increases in Zimbabwe, Malawi, and Argentina, as farmers respond to favorable local prices, are expected to more than offset a large drop in Turkey where unfavorable prices are likely to again depress plantings.

Southern Hemisphere 1991 crops, which are already planted, are expected to show increases in all countries. Argentine production is projected up over 25 percent due to increased plantings and better yields. Plantings are up in response to low stocks and strong export demand. In Brazil 1991 production is projected up only 1 percent to 440,000 tons due to improved yields forecast for northern production areas. Planted area in the south is expected to remain unchanged as producers have not finished price negotiations with buyers and most of the 1991 crop has already been transplanted. Malawi is expected to produce over 110,000 tons of tobacco, an 8 percent increase over 1990 if favorable weather patterns persist. Increased plantings and inputs are expected because of high farm prices received for the 1990 crop. This should result in higher yields. Farm prices were up 29 percent for flue-cured and nearly 40 percent for burley. In Zimbabwe, 1991 tobacco production is projected up 17 percent to 162,000 tons due to increased plantings and together with favorable weather and expected improved crop management should improve yields. This expansion is due to record farm prices; the average price of US $1.24 was 50 percent higher than producer estimates.

Production prospects in the Northern Hemisphere, where most 1991 crops are not yet planted, are mixed. In Canada, output is expected to be down about 5 percent as farmers plant less in response to reduced domestic and export demand for flue-cured tobacco, the only major type grown. Mexican tobacco production for 1991 is projected to fall over 4 percent to less than 33,000 tons due to a 6 percent drop in area planted. The largest reduction, of over 40 percent or nearly 5,000 tons, is in flue-cured. This fall is due to problems with forward contracting in Nayarit, the largest tobacco producing state. Thailand is expected to increase production of tobacco by 3 percent, to about 78,000 tons because of increased plantings due to favorable farm prices. Korean production for 1991 is projected up 5 percent to over 73,000 tons, assuming more normal yields this year following last year's wet summer that caused flue-cured yield to fall 11 percent. Japanese tobacco production for 1991 is projected down slightly to about 73,000 tons based on a slight drop in estimated plantings and yield. Japanese production of native light-air-cured types has dropped sharply since 1987, but flue-cured and burley production is trending up as the Japanese government would like to keep domestic production at 50 percent of consumption. Indian tobacco production for 1991 is projected up 4 percent to 510,000 tons due to improved yields. In Turkey, 1991 tobacco production is projected to fall 16 percent to 252,000 tons due to reduced plantings because of low support prices. Weak exports have caused a sharp run up in stocks and therefore support prices are not likely to increase.

Arthur Hausamann (382-8883)

TABLE 16

TOBACCO PRODUCTION FOR SELECTED COUNTRIES

	AREA HARVESTED (Hectares)		FARM SALES WEIGHT (Metric Tons)	
	1990	1991	1990	1991
Malawi	100,200	104,700	101,513	110,510
Turkey	260,850	230,850	252,144	212,144
India	397,000	383,400	490,000	510,000
Japan	30,661	30,411	74,410	73,100
Thailand	62,275	64,000	75,060	77,660
South Korea	31,339	31,400	70,073	73,420
Argentina	49,160	58,100	67,539	85,920
Brazil	282,000	282,000	435,000	440,000
Canada	28,360	26,940	65,025	61,970
Mexico	21,905	20,500	34,193	32,696
South Africa	24,841	24,975	33,947	35,390
Spain	23,187	23,700	41,090	41,950
Zimbabwe	62,262	68,890	138,937	162,055
Philippines	49,950	52,050	71,150	75,550
Total Above	1,423,990	1,402,816	1,950,081	1,922,365

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WORLD POULTRY AND EGG PRODUCTION

Revised forecasts for 14 selected countries, accounting for about two-thirds of world production, indicate World 1991 poultry meat production will approximate 37.2 million tons, essentially unchanged from the August forecast (see World Agricultural Production, August 1990). Forecasts for Mexico, Brazil, and France have been increased from those of August while Japan's output forecast has been reduced. At the aggregate level, forecast output of broiler meat at 25.2 million tons is essentially unchanged from the August forecast while output of turkey meat is forecast higher. Output of eggs is forecast at 541 billion eggs, representing an increase of 1 percent over the 1990 level. Egg production of 540 billion was forecast in August.

Broiler production in the United States in 1991 is forecast at 8.9 million tons, unchanged from the August forecast, but 5 percent above 1990. Broiler/feed price relationships continue to be favorable for producers. Somewhat faster growth is now forecast for Canada because the national production allotment has been adjusted upward. Mexico's 1991 broiler output is forecast at 690,000 tons, 55,000 tons above the August forecast. Favorable producer prices are providing the stimulus to expand output. Brazil's 1991 broiler production forecast has been increased as relative prices for feedgrains have declined, prices for broilers are favorable, and consumers continue to switch from beef and pork to lower priced chicken.

Forecasts of 1991 broiler output in France and the Netherlands are unchanged from August. However 1990 output in France was revised upward. Both domestic and export demand in France are growing moderately. Favorable broiler/feed price relationships continue to provide some stimulus to Dutch producers.

Output of broilers in Japan for 1991 is forecast at 1.33 million tons, 3 percent below the August forecast. The current forecast for 1991 is down nearly 1 percent from the 1990 level which in turn was down 1 percent from the 1989 figure. The downturn in Japanese broiler production, the first decline in modern history, reflects more competition from imports and higher production costs. Iraq's poultry and egg production forecasts have been revised sharply downward, due to probable impacts of the trade embargo. Thailand's 1991 broiler production is forecast at 630,000 tons, unchanged from August but 10 percent above the 1990 estimate. Rapid growth in both domestic and export markets are facilitating the large annual increases in Thai broiler production.

Output of total poultry meat in the USSR during 1991 is now forecast at 3.48 million tons, unchanged from August but 4 percent above the 1990 level. Problems in the general economy continue to have adverse impacts on the poultry sector which are more than offsetting the beneficial effect of a record grain crop harvested in the summer of 1990.

World turkey production in 1990 is forecast at 3.8 million tons, up slightly from the August forecast and up 4 percent from the 1990 level. In the United States, lower than expected fourth quarter 1990 returns and less favorable prospects for early 1991 resulted in a slight downward revision in the turkey production forecast from the August level. For 1991, a 5 percent increase above 1990's level is still expected. France's 1991 output of turkey meat is forecast at 420,000 tons, one percent above August and 2 percent above the 1990 estimate. Much of the increased output is forecast to be for export.

Global output of eggs is forecast at 541 billion, slightly above the August forecast and one percent above the 1990 estimate. In the United States, 1991 egg production is forecast at 68.6 billion, unchanged from August, but about 1 percent above teh 1990 level. U.S. producer egg prices appear to offer favorable profit prospects but producers are being cautious about expansion. Mexican egg production is forecast at 18.2 billion, one percent above the 1990 estimate. (The change since August is due to a statistical revision in the series rather than to sharply higher production.) An easing of price controls has given producers in Mexico hope for better returns. Forecast 1991 egg production in Brazil is up nearly 8 percent, but this represents recovery from the 1988-89 downturn rather than expanded capacity. Forecast output in the USSR is down from August as problems in the general economy appear to be adversely affecting egg production. Japan's egg output is forecast at 40.2 billion, slightly above the August forecast but slightly below the 1990 figure. Producers are facing rising costs of production and a tendency for egg consumption to decline.

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TABLE 17

TOTAL POULTRY MEAT PRODUCTION IN SELECTED COUNTRIES 1/
(In 1,000 metric tons)

SELECTED PRODUCERS	1988	1989	1990 2/	Forecast 1991 Aug.	Forecast 1991 Jan.
Canada	656	659	694	700	720
Mexico	592	635	700	665	735
United States	9,427	10,106	10,851	11,375	11,384
Brazil	1,997	2,139	2,400	2,613	2,643
France	1,434	1,550	1,604	1,580	1,620
Netherlands	485	491	515	520	530
USSR	3,184	3,300	3,350	3,480	3,480
Iraq	235	225	200	180	100
Kuwait	20	21	18	15	5
Saudi Arabia	248	241	265	263	275
Hong Kong	35	34	32	32	32
Japan	1,471	1,482	1,467	1,495	1,455
Singapore	63	58	55	62	55
Thailand	511	553	595	655	655
SUBTOTAL	20,358	21,494	22,746	23,635	23,689
Others 3/	12,563	12,658	12,929	13,514	13,514
WORLD	32,921	34,152	35,675	37,149	37,203

1/ This is the semiannual update of the production series regularly published in the World Agricultural Production and World Poultry Situation circulars. World totals compare to those in the above mentioned circulars.
2/ Preliminary
3/ Countries with no new information since August.

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TABLE 18

BROILER MEAT PRODUCTION IN SELECTED COUNTRIES 1/
(In 1,000 Metric Tons)

SELECTED PRODUCERS	1988	1988	1990 2/	Forecast 1991 Aug.	Forecast 1991 Jan.
Canada	537	539	565	570	590
Mexico	490	590	660	635	690
United States	7,342	7,905	8,473	8,893	8,904
Brazil	1,947	2,084	2,340	2,550	2,580
France	844	898	929	930	930
Netherlands	396	406	422	435	435
USSR	1,760	1,820	1,830	1,940	1,940
Iraq	223	214	190	168	80
Saudi Arabia	248	240	263	260	273
Hong Kong	24	23	22	23	22
Japan	1,346	1,355	1,340	1,370	1,330
Singapore	52	48	45	52	45
Thailand	498	538	575	630	630
SUBTOTAL	15,707	16,660	17,654	18,456	18,449
Others 3/	6,673	6,506	6,585	6,751	6,751
WORLD	22,380	23,166	24,239	25,207	25,200

1/ This is the semiannual update of the production series regularly published in the World Agricultural Production and World Poultry Situation circulars. World totals compare to those in the above mentioned circulars.
2/ Preliminary
3/ Countries with no new information since August.

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TABLE 19

TURKEY MEAT PRODUCTION IN SELECTED COUNTRIES 1/
(In 1,000 metric tons)

SELECTED PRODUCERS	1988	1989	1990 2/	Forecast 1991 Aug.	Forecast 1991 Jan.
Canada	119	120	129	130	132
Mexico	14	9	8	8	8
United States	1,796	1,940	2,119	2,219	2,216
Brazil	50	55	60	63	63
France	332	387	410	415	420
Netherlands	27	27	32	25	35
USSR	115	120	130	135	135
SUBTOTAL	2,453	2,658	2,888	2,995	3,009
Others 3/	717	751	742	776	776
WORLD	3,170	3,409	3,630	3,771	3,785

1/ This is the semiannual update of the production series regularly published in the World Agricultural Production and World Poultry Situation circulars. World totals compare to those in the above mentioned circulars.
2/ Preliminary
3/ Countries with no new information since August.

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TABLE 20

EGG PRODUCTION IN SELECTED COUNTRIES 1/
(In million eggs)

SELECTED PRODUCERS	1988	1989	1990 2/	Forecast 1991 Aug.	Forecast 1991 Jan.
Canada	5,721	5,719	5,650	5,250	5,600
Mexico	17,859	17,950	18,040	15,120	18,220
United States	69,402	67,042	67,962	68,580	68,580
Brazil	14,850	12,174	13,420	14,490	14,490
France	15,300	15,050	14,600	15,050	14,800
Netherlands	10,761	10,660	10,790	10,800	10,750
USSR	85,150	84,600	83,500	85,500	84,000
Iraq	1,600	1,500	1,300	1,200	1,000
Saudi Arabia	2,765	2,800	2,900	2,985	2,985
Hong Kong	40	34	34	38	34
Japan	40,137	40,383	40,250	40,000	40,150
SUBTOTAL	263,585	257,912	258,446	259,013	260,609
Others 3/	277,023	276,815	277,054	280,748	280,748
WORLD	540,608	534,727	535,500	539,761	541,357

1/ This is the semiannual update of the production series regularly published in the World Agricultural Production and World Poultry Situation circulars. World totals compare to those in the above mentioned circulars.
2/ Preliminary
3/ Countries with no new information since August.

January 1991 Production Estimates and Crop Assessment Division

PRODUCTION OF TOMATOES FOR PROCESSING IN SELECTED COUNTRIES

Output of tomatoes for processing in 11 major producing countries is estimated at 19.5 million tons for 1990, somewhat above the 1989 level but below the July forecast of 20.4 million tons. Preliminary data indicate the 1990 area harvested in the 11 countries was up about 10 percent compared to 1989 and up 24 percent compared to 1988. The increase in area occurred in both the United States and the EC. Production of processing tomatoes in the Mediterranean Basin (listed EC countries plus Turkey and Israel) declined slightly in 1990 due to lower output in Turkey and Israel.

In the United States, favorable prices in product markets stimulated another large increase in plantings with 146,000 hectares contracted compared to the total harvested area of 130,000 hectares in 1989. Production under contract in 1990 was 9.4 million tons, 10 percent below the July forecast but still well above the 1989 level. In Canada, expanded plantings and generally favorable weather during the season provided the basis for a sharp increase in production. Mexico's elimination of the quota system on tomato plantings in July 1988 and stronger prices for tomato products induced a significant production increase for both 1989 and 1990. Area planted for the 1991 crop (harvested February-May 1991), is estimated to have expanded about 10 percent and Mexican production is expected to increase by approximately the same percentage.

Output of processing tomatoes in 5 EC countries is estimated at 7.2 million tons, only 1 percent above 1989. The crop was reduced by unfavorable summer weather in several major growing areas, particularly Greece and, to a lesser extent, Italy. EC quotas and support prices in ECU terms were unchanged from 1989. Output in Italy, the leading EC producer, is estimated at 3.8 million tons, the same as in 1989 and down slightly from the June estimate. Planted area was up, but disease and unfavorable weather kept yields well below their potential. Processing tomato production in Greece in 1990 was hurt by a dry summer that caused output to decline nearly 20 percent compared to the 1989 figure. Spain's production of processing tomatoes for 1989, estimated at 1.1 million tons, is nearly 16 percent above the 1989 crop and 2 percent above the July forecast due to favorable yields resulting from excellent growing season weather. Output of processing tomatoes in Portugal, estimated at 760,000 tons, was up sharply. The forecast in July was for a large annual increase but the crop benefited from exceptionally favorable growing and harvesting weather.

Turkey's output of commercial processing tomatoes is estimated at 1.5 million tons in 1990, down 200,000 tons from the 1989 level and down 100,000 tons from the July forecast. A build-up of product stocks during 1989 appears to have caused some farmers to switch to other crops. Israel's 1990 output is estimated at 300,000 tons, down from 1989 as both buying prices for tomatoes and irrigation water availability have declined.

Taiwan's 1991 output of processing tomatoes (harvested December 1990 - April 1991) is forecast at 185,000 tons, up slightly from the 1990 figure. Yields are expected to be above last year's levels which were depressed by typhoon damage.

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TABLE 21

PRODUCTION OF TOMATOES FOR PROCESSING IN SELECTED COUNTRIES
(Thousand Tons)

Country	1988	1989	Preliminary 1990	Forecast 1991
United States	6,722	8,604	9,387	--
Canada	519	539	580	--
Mexico	282	317	365	400 1/
Italy	3,160	3,800	3,800	--
France	276	323	340	--
Greece	1005 2/	1,400 3/	1,150 4/	--
Spain	746	976	1,134	--
Portugal	450	611	760	--
Turkey	1,150	1,700	1,500	--
Israel	136	317	300	--
Taiwan	207	220	182	185 1/
Total	14,653	18,807	19,498	--

1/ Forecasts for 1991 are based on conditions as of early December and are available only for Mexico and Taiwan which harvest early in the year.
2/ Includes 44,000 tons not delivered to processors.
3/ Includes 8,000 tons withdrawn from the market and approximately 100,000 tons not delivered to processors.
4/ Includes 81,000 tons not delivered to processors.

January 1991 Production Estimates and Crop Assessment Division

PULSE PRODUCTION IN SELECTED COUNTRIES

The 1990/91 production of dry pulses (dry beans, dry peas, lentils, and garbanzo beans) in selected major producing countries, excluding the USSR, is estimated at 31.3 million tons, up 3.1 million, or 11 percent from last year and up 18 percent since 1985/86. The estimate does not include the USSR since the 1990/91 USSR dry bean and dry pea production figures have not yet been reported. However, favorable weather and an increasing production trend indicate higher production for the USSR this year.

The 1990/91 dry bean production for selected countries, less the USSR, is estimated at 16.2 million tons, up 1.4 million or 9 percent from last year. Harvested area is estimated at 26.3 million hectares, down 1 percent from last year. The increase in production is attributable to higher estimated yields in Egypt, India, and Mexico. India, Brazil, the United States, and Mexico are the primary producers of dry beans.

The 1990/91 dry pea production for selected countries, less the USSR, is estimated at 6.4 million tons, up 0.8 million or 15 percent from last year. Harvested area is estimated up 16 percent from 1989/90 at 3.0 million hectares. Increased area and yield in France boosted total production this year. As noted earlier, the 1990/91 USSR production is not estimated at this time; however, in 1989/90 the USSR produced 8.0 million tons, or nearly 60 percent of the selected countries total. France is the other primary producer of dry peas.

The 1990/91 garbanzo bean production for selected countries is estimated at 6.5 million tons, up 0.6 million or 10 percent from last year, while harvested area is estimated to increase 4 percent to 8.9 million hectares. India produces nearly 75 percent of the selected countries' total garbanzo bean output, while Turkey and Pakistan combine to add another 19 percent to the total.

The 1990/91 lentil production for selected countries is estimated at 2.2 million tons, up 0.2 million or 12 percent from last year, while harvested area is estimated up marginally at 2.9 million hectares. India and Turkey are the primary lentil producers.

PRODUCTION IN SELECTED COUNTRIES

United States: Dry bean production in 1990/91 is estimated at 1.48 million tons, up 38 percent from last year and 70 percent above 2 years ago. Record yields in Michigan and New York, coupled with record production in Nebraska, helped produce a bumper crop. Lentil production is estimated at 40,000 tons, down 25 percent from last year, while dry pea production is estimated at 108,000 tons, down 39 percent from last season. Lentils and dry peas, grown primarily in Washington and the Palouse Hills region of Idaho, were adversely affected by cool weather in the spring.

Canada: Pulse production in 1990/91 is estimated at 0.60 million tons, nearly 30 percent above last year. Western pulse crops benefited from excellent growing conditions, boosting yields well above average.

Bean producers since 1988 have had a voluntary tripartite (1/3 Canadian government, 1/3 provincial, and 1/3 producer) support program that pays participants when market prices for beans fall below a calculated national support price. There were no payouts for the 1988/89 crop, but the 1989/90 kidney and white pea bean had a prelinimary Can$5.15/metric ton payout.

Mexico: Given the favorable summer and fall weather throughout Mexico this season, dry bean production is estimated at 1.30 million tons in 1990/91, up 115 percent from last year. Dry bean production is expected to recover from last year's disastrous harvest caused by late planting and a freeze during late September, the flowering period. Dry bean area increased 19 percent from 1989, in part from higher guaranteed producer prices. (Corn is the only other crop that receives this preferential treatment.) Given that the Government of Mexico has expressed a priority to dry bean production, it is expected that area will increase at the expense of rice, wheat, and sorghum.

European Community: Dry pea production for 1990/91 is estimated at 4.61 million tons, up 23 percent from last year due to higher French yields and greater area. France is the main producer of dry peas in the EC. This year's sharp rise in French production is attributed to the combination of increased support prices and less-than-intended rapeseed, corn, and barley plantings due to dry weather. Denmark's dry pea output is estimated above last year due to favorable growing conditions that boosted yields. This year's EC minimum grower price for the 1990 dry pea crop was reduced 13 percent from 1989 owing to the excess of production above the EC minimum guaranteed quantity for 1990.

Dry bean production in the EC fell 11 percent in 1990/91 to 0.82 million tons, in part due to a reduction in area and lower yields in most of the countries. Garbanzo and lentil production showed little change from 1989.

India: Pulse production in 1990/91 for the world's largest producer is estimated at 13.75 million tons, slightly above the 1989/90 level. Due to an excellent performance of the summer moonsoon this year, the outlook for the fall harvested pulses such as mung beans and pigeon peas is promising.

Pulses form an integral part of the Indian diet providing protein to the majority vegetarian population. Pulses occupy nearly 23 million hectares of cropped area, almost the same area as wheat. In some regions, pulses are intercropped with wheat and other grains. Pulses are generally grown on marginal land without irrigation or fertilizer.

The Government is currently implementing a National Pulses Development Program, with the objective to increase production by adopting specific technology suited to different agro-climatic areas. The program includes distribution of mini-kits containing better quality seeds to farmers, organization of field demonstrations, and production of breeder or foundation seeds. Although the Government establishes minimum support prices for all major pulses, open market prices are generally higher than the support price.

Pakistan: The 1990/91 pulse production is estimated at 0.74 million tons, 11 percent higher than last year due to increased yields of the non-irrigated garbanzo crop which benefited from favorable rainfall. In order to encourge garbanzo production, the Government has a support price for garbanzos (no other pulses have a support structure), but it is below the average open market price.

Turkey: Lentil production in 1990/91 is estimated at 0.8 million tons, rising marginally from last year due to increased area and favorable weather. The government continues to encourage lentil production, especially on fallow land. Toprak Mahsulleri Ofisi, a state economic enterprise, purchases some of the lentils at support prices and sells them to domestic and foreign markets. A surtax is assessed on lentil imports to protect local farmers.

Dry bean production is estimated at 0.2 million tons, up 11 percent from last year's drought-induced reduction. Dry beans have no support price or other Government assistance and all commercial production is marketed by the private sector.

Brazil: The 1990/91 dry bean crop is estimated at 2.34 million tons, almost unchanged from last year. Rain and frost in Parana and lack of adequate financing for large producers in Sao Paulo caused late plantings this year. Due to shortages of domestic availabilities of dry beans during 1990, domestic prices are currently favorable for producers, thus giving them incentive to increase plantings.

Argentina: Pulse production in 1990/91 is estimated at 0.20 million tons, 25 percent below last year. As pulse production is export oriented, low international prices caused producers to reduce dry bean area in 1990/91. In addition, rains during harvest caused excessive bean moisture and lack of driers further contributed to an estimated 30 percent crop loss at harvest.

Peru: The 1990/91 pulse crop is estimated at 116,000 tons. The crop was hurt by a nation-wide drought which caused farmers to reduce planted area. Yields also are estimated to drop 7-10 percent below the level of last year. Although there is no specific Government policy for pulse production, the private sector is becoming interested in promoting pulses for export. Trade companies are reportedly making contact with farmers and providing them with crop financing and technical assistance. Also, a pulse committee has been formed under the National Export Association to explore market development opportunities.

Egypt: Pulse production is estimated at 0.47 million tons for 1990/91, unchanged from a year ago. Higher producer receipts have been offset by increases in input costs, as well as by the relatively higher returns that can be earned from competing winter crops, particularly wheat and berseem clover.

Imports of pulses are banned to protect domestic production and to conserve foreign exchange. However, reduced lentil production has led the government to allow periodic imports. Lentil production has declined sharply from the mid-1970's because of salinization in the major production areas following construction of the High Aswan Dam. Bean area has been expanding as more cotton farmers are planting beans to replenish nitrogen following the heavy nutient demand of cotton.

South Africa: Dry bean production in 1990/91 is estimated at 95,000 tons, or up 2 percent from last year due to expanded area. The growth in production is mainly the result of marketing problems in the summer grain industries which make the dry bean prices attractive.

The industry is under the control of the Dry Bean Board. The powers vested in the Board do not provide for the fixing of dry bean prices, but the marketing is controlled under a floor price scheme. Producers are free to market their beans through normal marketing channels, but in times of surplus the Board guarantees minimum prices to producers. The activities of the Board are financed by levies on trade.

Australia: Dry pea production for 1990/91 is estimated at 0.38 million tons, similar to last year due to adequate seasonal conditions. The estimated area for dry peas is approximately the same as last year even though South Australia experienced a 15 percent decrease in planted area due to concern about erosion and a late beginning to the season. However, field pea production in Western Australia has increased due to its comparative attractiveness compared to the grazing industries.

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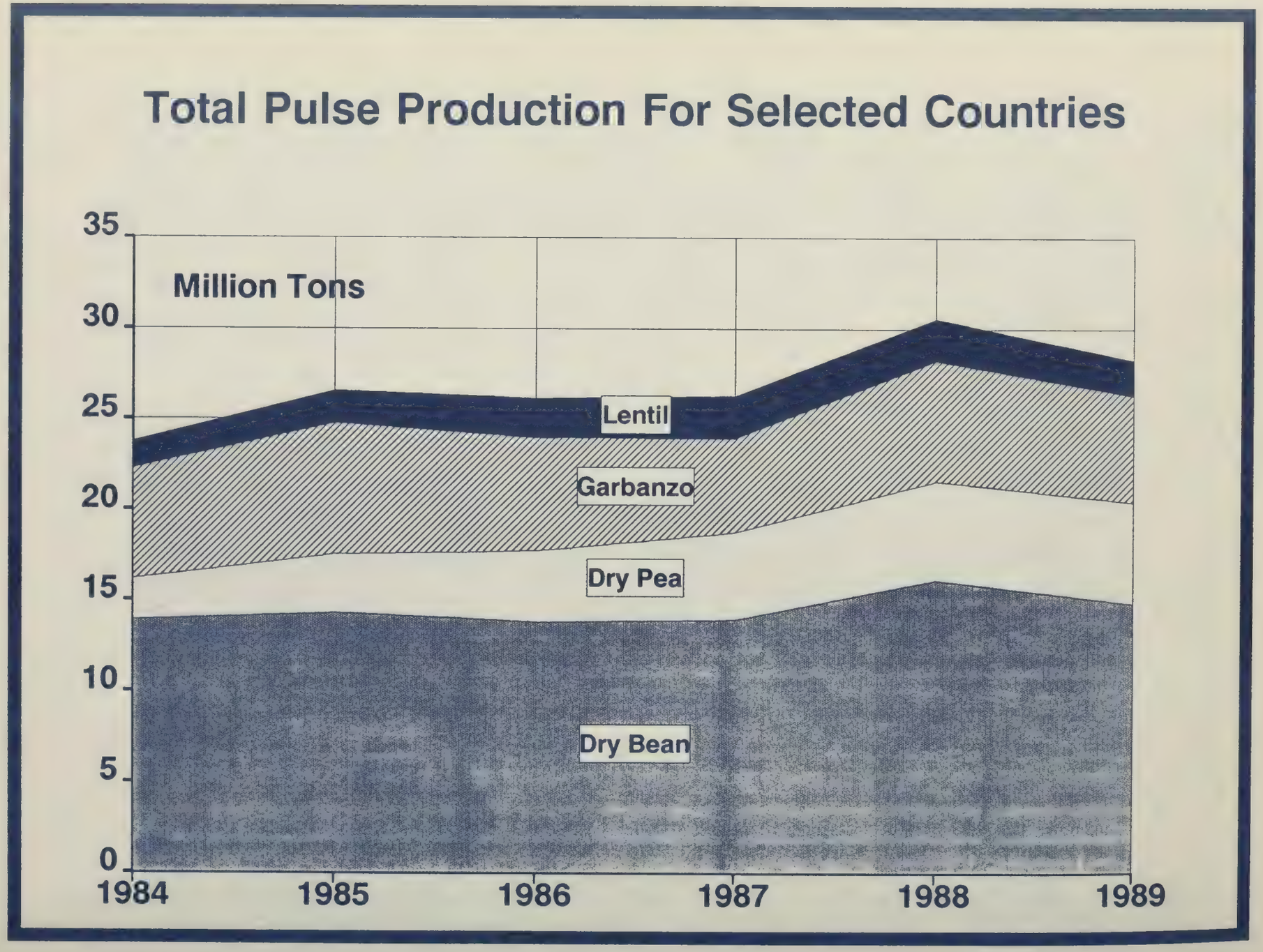

Total Pulse Production For Selected Countries
Million Tons
35
30
25
20
15
10
5
0
1984
1985
1986
1987
1988
1989
Lentil
Garbanzo
Dry Pea
Dry Bean

TABLE 22

DRY BEAN AREA AND PRODUCTION FOR SELECTED COUNTRIES

	Harvested Area in Thousand Hectares							Production in Thousand Metric Tons						
	1984	1985	1986	1987	1988	1989	1990	1984	1985	1986	1987	1988	1989	1990
AFRICA														
Algeria	72	73	69	68	71	60	60	32	41	33	31	34	16	17
Egypt	129	142	113	120	138	150	160	271	302	282	323	406	410	420
Kenya	391	480	502	510	748	936	920	136	177	325	208	243	257	235
Morocco	190	212	196	211	207	212	224	122	195	215	127	232	166	134
South Africa	47	56	54	60	64	69	70	69	77	58	74	85	93	95
ASIA														
India	15,000	15,028	14,613	14,236	14,800	14,600	14,900	6,500	6,488	6,133	6,360	7,500	7,300	7,750
Japan	96	85	78	86	87	91	93	152	141	128	133	133	143	141
Pakistan	177	221	215	188	195	252	210	92	114	106	87	84	107	91
Philippines	49	51	43	45	45	45	45	38	41	31	35	35	38	38
Thailand	483	526	440	427	436	409	423	352	363	275	220	222	242	250
Turkey	154	192	195	175	180	185	190	190	220	210	200	210	180	200
EUROPEAN COMMUNITY														
Bel/Lux	1	1	1	1	1	1	2	1	2	2	3	3	4	4
France	70	41	39	33	38	36	24	190	120	124	120	158	125	93
W. Germany	8	14	27	54	60	47	28	27	55	106	195	217	166	100
Greece	22	25	22	21	16	17	15	31	38	35	31	22	22	24
Italy	43	39	36	33	30	25	22	72	61	60	51	52	42	38
Netherlands	5	5	6	12	16	10	7	17	19	30	51	63	39	26
Portugal	212	195	198	196	84	94	106	43	44	44	44	23	13	14
Spain	113	103	105	99	100	94	90	76	71	78	69	63	59	54
U.K.	32	45	60	91	154	129	143	125	154	229	294	514	450	465
NORTH AMERICA														
Canada	43	53	64	89	79	70	94	64	79	73	146	93	110	135
Costa Rica	43	43	48	56	49	64	54	23	22	29	32	22	34	27
El Salvador	58	58	60	45	67	92	65	48	35	50	24	56	44	57
Guatemala	170	170	173	172	140	97	142	111	120	123	86	92	89	118
Honduras	59	66	73	50	79	81	68	33	48	47	23	52	57	54
Mexico	1,600	1,800	1,950	1,950	1,850	1,600	1,900	820	1,000	1,025	1,100	1,175	605	1,300
United States	591	583	605	683	547	668	857	956	1,004	1,038	1,175	873	1,076	1,481
SOUTH AMERICA														
Argentina	225	191	254	211	160	227	165	240	210	281	163	125	227	160
Brazil	5,319	5,317	5,484	5,220	5,904	5,137	4,751	2,615	2,550	2,210	2,108	2,901	2,300	2,337
Chile	85	83	89	86	76	63	69	94	101	89	81	100	73	87
Colombia	110	132	127	128	128	132	140	80	99	104	96	96	98	110
Dom. Rep.	69	53	43	63	69	62	69	55	40	29	43	54	41	33
Ecuador	58	58	55	58	50	68	69	34	34	43	38	38	59	60
Peru	52	57	60	65	61	58	55	40	46	53	56	55	52	46
Venezuela	51	72	76	89	78	82	80	24	38	40	48	43	46	53
USSR	53	57	53	50	50	50	NA	150	160	75	70	60	65	NA
TOTAL	25,880	26,327	26,226	25,681	26,857	26,013	26,310*	13,923	14,309	13,813	13,945	16,134	14,848	16,247*

NA = Not Available; * = Total does not include the USSR.

January 1991

Production Estimate and Crop Assessment Division

TABLE 23

GARBANZO BEAN AREA AND PRODUCTION FOR SELECTED COUNTRIES

	Harvested Area in Thousand Hectares							Production in Thousand Metric Tons						
	1984	1985	1986	1987	1988	1989	1990	1984	1985	1986	1987	1988	1989	1990
AFRICA														
Algeria	51	58	70	68	70	52	52	16	18	26	22	26	15	15
Egypt	8	8	10	8	7	7	7	11	13	18	13	13	13	14
Morocco	60	77	82	77	73	62	77	29	45	71	61	56	44	59
ASIA														
Bangladesh	109	104	104	103	103	100	100	81	78	82	75	66	65	66
India	7,161	7,805	6,984	5,806	6,900	6,500	6,700	4,751	5,788	4,532	3,622	5,060	4,500	4,800
Pakistan	977	1,033	1,082	821	821	979	1,002	527	586	583	371	371	456	537
Syria	53	79	38	84	84	34	54	36	50	28	43	55	13	30
Turkey	345	400	533	600	650	680	690	335	400	630	700	750	600	700
EUROPEAN COMMUNITY														
Greece	7	5	4	5	4	4	3	8	6	4	5	5	5	4
Italy	11	10	9	8	8	7	7	14	12	10	9	8	7	7
Portugal	27	26	25	24	24	24	24	14	13	12	12	12	12	12
Spain	88	88	90	91	77	56	66	60	58	58	64	59	44	59
SOUTH AMERICA														
Chile	11	13	15	14	8	9	9	9	10	15	8	4	6	6
NORTH AMERICA														
Mexico	136	135	140	140	140	120	150	173	139	150	150	150	120	170
TOTAL	**9,044**	**9,841**	**9,186**	**7,849**	**8,969**	**8,634**	**8,941**	**6,064**	**7,216**	**6,219**	**5,155**	**6,635**	**5,900**	**6,479**

TABLE 24

LENTIL AREA AND PRODUCTION FOR SELECTED COUNTRIES

	Harvested Area in Thousand Hectares							Production in Thousand Metric Tons						
	1984	1985	1986	1987	1988	1989	1990	1984	1985	1986	1987	1988	1989	1990
AFRICA														
Algeria	13	5	8	7	8	7	7	2	1	2	1	2	1	2
Egypt	8	8	9	10	7	7	8	10	13	14	18	14	15	16
Morocco	68	88	86	90	65	58	57	25	46	70	36	51	22	33
ASIA														
Bangladesh	233	223	213	217	215	210	220	164	160	149	159	158	156	162
India	943	1,091	1,087	1,053	1,100	1,200	1,200	534	663	659	653	745	750	750
Jordan	5	5	5	5	5	5	5	1	2	2	2	2	2	2
Pakistan	83	58	81	76	76	68	80	22	31	32	31	31	31	38
Syria	60	66	67	89	132	188	144	36	48	63	72	171	64	101
Turkey	620	577	747	850	875	890	900	570	618	850	900	950	700	800
EUROPEAN COMMUNITY														
France	8	8	8	8	3	4	4	13	13	13	13	5	6	8
Greece	5	4	2	2	2	2	1	5	5	2	2	2	2	2
Italy	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Spain	67	64	66	91	72	52	45	44	51	39	49	51	34	27
NORTH AMERICA														
Canada	64	73	131	238	135	103	139	39	62	170	314	59	97	186
United States	29	41	64	58	29	37	42	27	37	86	81	41	53	40
SOUTH AMERICA														
Argentina	11	16	15	22	22	25	25	7	12	15	25	25	22	30
Chile	36	37	46	33	15	14	15	25	25	25	20	8	8	8
TOTAL	**2,254**	**2,365**	**2,636**	**2,850**	**2,762**	**2,871**	**2,893**	**1,525**	**1,788**	**2,192**	**2,377**	**2,316**	**1,964**	**2,206**

TABLE 25

DRY PEA AREA AND PRODUCTION FOR SELECTED COUNTRIES

	Harvested Area in Thousand Hectares							Production in Thousand Metric Tons						
	1984	1985	1986	1987	1988	1989	1990	1984	1985	1986	1987	1988	1989	1990
AFRICA														
Algeria	17	17	18	18	19	15	15	6	7	5	4	5	2	2
Egypt	4	2	3	3	11	12	12	6	3	6	6	23	23	24
Morocco	57	57	50	45	46	51	70	28	48	42	22	39	39	63
ASIA														
Bangladesh	400	392	374	393	391	390	390	272	260	253	289	255	280	285
India	444	494	472	464	440	440	450	364	422	383	405	425	450	450
Japan	1	1	1	1	1	1	1	2	2	2	2	2	2	2
Pakistan	145	141	143	138	145	148	150	69	68	69	67	71	75	78
Turkey	2	2	2	2	2	2	2	4	4	4	4	4	4	4
EUROPEAN COMMUNITY														
Bel/Lux	1	1	2	4	2	2	4	2	2	8	13	10	8	18
Denmark	34	100	120	200	144	119	111	255	525	509	507	497	461	525
France	128	197	274	414	482	623	690	620	920	1,108	1,720	2,425	2,814	3,623
W. Germany	2	16	39	51	29	20	17	7	50	120	147	103	69	60
Italy	3	3	3	3	5	10	11	5	5	5	5	11	32	33
Netherlands	11	20	22	35	28	16	12	56	71	124	122	108	76	60
Spain	3	3	2	2	3	6	8	3	3	2	2	5	6	11
U.K.	39	78	77	99	90	85	79	161	213	282	263	287	277	284
NORTH AMERICA														
Canada	75	75	131	253	293	170	142	131	169	238	442	347	267	286
United States	45	45	72	65	72	70	64	113	113	145	154	174	176	108
OCEANIA														
Australia	141	208	317	433	456	331	332	64	241	518	485	517	392	384
New Zealand	22	22	27	37	25	19	18	76	76	65	106	74	47	54
SOUTH AMERICA														
Argentina	8	10	8	18	25	15	8	8	13	11	15	24	20	12
Chile	6	8	6	6	14	8	9	6	8	5	5	8	4	6
Dom. Rep.	30	30	30	30	30	39	29	19	16	15	17	27	32	17
Ecuador	10	11	22	25	24	25	25	10	15	16	16	16	16	16
USSR	5,434	5,337	5,457	5,500	5,340	4,906	NA	7,000	7,200	6,296	7,000	7,500	8,008	NA
TOTAL	7,062	7,270	7,672	8,239	8,117	7,523	NA	9,287	10,454	10,231	11,818	12,957	13,580	NA
TOTAL LESS USSR	1,628	1,933	2,215	2,739	2,777	2,617	3,039	2,287	3,254	3,935	4,818	5,457	5,572	6,405

NA = Not Available
January 1991

Production Estimates and Crop Assessment Division

ARGENTINE WHEAT PRODUCTION

Overview and Current Situation

Argentina is expected to be the 11th largest wheat producer in the world this year, and the 5th largest wheat exporter, providing significant competition for U.S. wheat producers. Production for the 1990/91 crop currently is estimated at 11.2 million metric tons, an increase of 10 percent over last year's output. The majority of 1990/91 production is destined for export because of stable-to-declining domestic demand. Wheat area for 1990/91 currently is estimated at 5.9 million hectares, up 8 percent from last year's area.

The 1990/91 crop season started favorably. Planting occurred under ideal conditions and the Government urged farmers to plant additional area; the macroeconomic situation had improved and domestic market prices were higher than those of the previous 2 years. Soil moisture reserves were abundant and planting generally was finished ahead of the previous year's schedule. A prolonged dry spell during the winter was broken by rains in September. For the critical months of October and November, ample rains fell, resulting in above-normal precipitation. However, the rains continued into December causing some associated harvest damage. Early harvest results showed yields above expectations in Santa Fe province but below those estimated earlier in Cordoba and Buenos Aires. Harvest was nearing completion as of the third week of January.

The majority of wheat is grown in the pampas, the main agricultural region of Argentina. The pampas are divided into humid and dry areas. Wheat is suitable for the vast, drier areas of the western and southwestern pampas where the best quality wheats grow. The largest producing areas are central and southern Buenos Aires province. Wheat is considered profitable to fertilize in this area where approximately normally 70 percent of the area is fertilized. Elsewhere, little fertilizer is used because it is commonly believed that applying fertilizer does not produce economic gains. The importance of grain production has taken second place to the rising oilseeds economy, especially soybeans.

Production Situation

Argentine wheat production has been unstable, fluctuating from year to year due to yield variations and changing economic programs. The majority of wheat, approximately 60 percent, is produced in Buenos Aires province. The most important areas are in southern Buenos Aires, around the towns of Tandil, Pigue, and Tres Arroyos, which account for nearly half of the wheat grown in the province. The balance is produced in Santa Fe, Cordoba, La Pampa, and Entre Rios provinces. Wheat area has ranged between 4.7 and 7.3 million hectares over the last 10 years. Changes in area had been strongly influenced by support prices and the export tax. However, no minimum support prices were set for 1989/90 or 1990/91. Market signals and the Government's urgings led to this year's expansion. The increased wheat area was shifted from land previously devoted to barley, rye, sorghum, oats, and pasture. Wheat is sometimes double cropped with soybeans by planting second-crop soybeans after the wheat harvest. The percentage of soybeans which are double cropped varies considerably -- from a high of approximately 70 percent in the early 1980s to last year's 35 percent. Most of the double cropped area is in northern Buenos Aires province, and southern Santa Fe and Cordoba provinces.

Argentine wheat yields have fluctuated greatly, yet have slowly improved over the last 20 years. Weather during the critical grain-filling months of October through December has been the dominant factor affecting yields. In Santa Fe and Entre Rios provinces, warm winters and less-than-normal rains decrease yields, while in La Pampa and Buenos Aires provinces spring drought and occasional frosts can adversely affect yields.

Economic Factors and Government Policy

Despite poor infrastructure, Argentine wheat farmers are generally considered among the lowest cost producers. However, with international wheat prices falling sharply since planting, some farmers will likely not cover production costs this year. Costs have increased due to inflation, although hyperinflation has been slowed. Monthly inflation has ranged between 10 to 15 percent (versus as much as 200 percent earlier) since strict monetary controls were applied in March 1990. The Government's policy of supporting what many consider to be an over-valued austral, combined with the steady inflation rate, and declining international prices has resulted in a dim outlook for economic export returns. While few alternatives are available for Argentine producers, storing some of the crop is an option. However, storage is expensive and traditionally wheat is sold at or near harvest. Using wheat as feed or forage is a possibility, but traditionally cattle are range-fed. Selling wheat at whatever price is obtainable, even if it is below the cost of production, appears the most likely outcome.

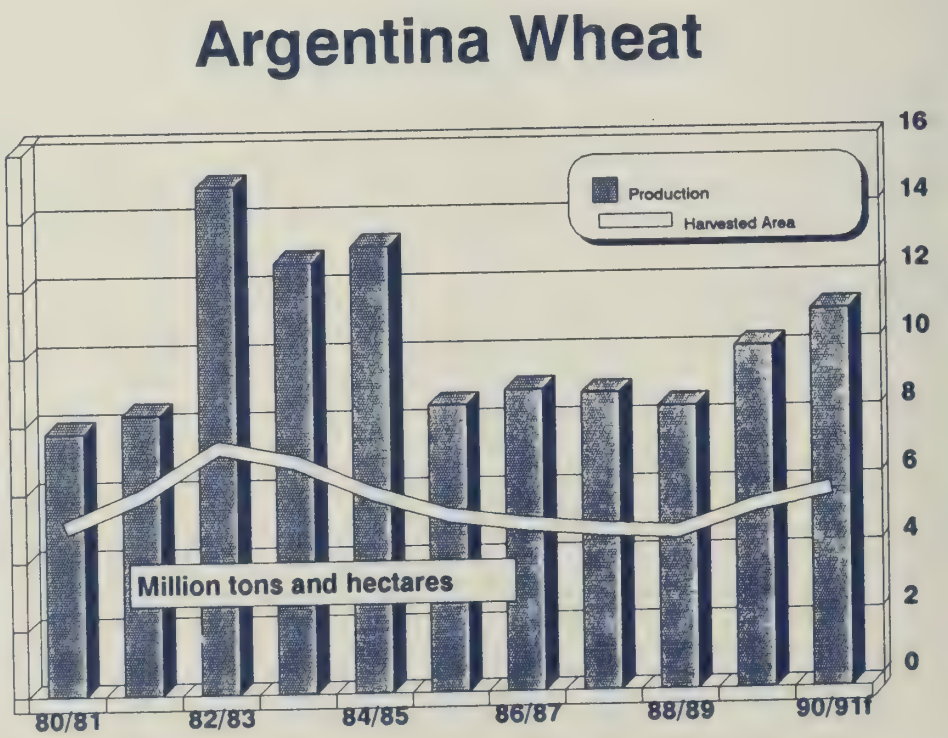
The National Grain Board (JNG), whose role in the market has diminished, recently began purchasing wheat, hoping to support prices through this action. Its support is contrary to the long-term plan to reduce the JNG's impact. The JNG's role is being re-evaluated by the Government. It had been a grain marketing agency: setting price support levels, negotiating large long-term trade agreements, providing some storage, and administering export programs. The JNG frequently operates a barter system for cash-short farmers, exchanging inputs for wheat. The estimated 1989/90 participation rate for this program was 30 percent. The difference from past years has been the JNG did not set a support price in 1989/90 and has not set one this year. The board is involved in several long-term agreements with Brazil, Iran, and Peru. The 15 percent export tax on wheat was eliminated effective November 15, 1990. The elimination of the export tax could ease cash flow problems for farmers who finance the planting of summer oilseed crops with wheat receipts.

Robert Tetrault (475-5140)

TABLE 26

ARGENTINA WHEAT: AREA, YIELD AND PRODUCTION

Crop Year	Area (MHa)	Yield (MT/Ha)	Production (MMT)
1980/81	5.023	1.549	7.780
1981/82	5.926	1.401	8.300
1982/83	7.320	2.049	15.000
1983/84	6.880	1.853	12.750
1984/85	5.950	2.218	13.200
1985/86	5.270	1.613	8.500
1986/87	4.982	1.792	8.930
1987/88	4.789	1.838	8.800
1988/89	4.700	1.787	8.400
1989/90	5.450	1.862	10.150
1990/91 f	5.900	1.898	11.200
10 year avg.	5.629	1.796	10.181



CANADIAN OILSEEDS

Total Canadian oilseeds production in 1990/91 is estimated at 5.7 million tons, nearly 17 percent above last year's output, despite an estimated 4-percent decline in harvested area from 1989/90. Good growing and harvest conditions boosted a recovery of yields in nearly all producing regions from the drought suffered during 1989/90. The accompanying table illustrates 1990/91 oilseed harvested area, production, and yield by province.

Rapeseed

Once again, Canada ranked as the world's fourth largest rapeseed producer in 1990/91, behind India, the European Community, and China. This season's rapeseed output (canola is the variety grown throughout the growing regions) is estimated at 3.3 million tons, up 7 percent from 1989/90, but well short of the record 4.3 million set during 1988/89. An average yield of 1.26 metric tons per hectare--just below the 5-year average--boosted output despite an area decline of 9 percent to 2.63 million hectares, the lowest since 1983/84. Saskatchewan overtook Alberta as the largest rapeseed producer in 1990/91, accounting for 44 percent of total Canadian rapeseed output compared to 39 percent for Alberta. Harvested area was down 13 percent in Saskatchewan, but average yield rose 28 percent over last year, pushing output to 1.45 million tons or 12 percent above last year. Alberta registered a 3-percent decline in rapeseed production to 1.29 million tons. A 4-percent drop in area was only slightly offset by a 1-percent increase in average yield from last season. Manitoba, which accounted for 15 percent of this year's crop, experienced the best yield recovery of all the producing regions. With a substantial decline in area, down an estimated 17 percent from last year, production jumped 25 percent above 1989/90, as average yields rose an estimated 51 percent.

Soybeans

This season's soybean production reached a record 1.33 million tons, 9 percent over last year and 4 percent above the previous record set during 1987/88. While area was the smallest, at 504,000 hectares, since 1987/88, average yields climbed to the second highest on record to 2.63 tons per hectare. Ontario produces 96 percent of Canada's soybeans, with the remainder produced in Quebec. This spring's soybean planting was initially delayed by wet conditions in Eastern Canada which caused crop development to lag by as much as two weeks. The crop matured slowly due to relatively cool conditions throughout the season and, compounded by a rainy fall, pushed the soybean harvest to late October. As a result of the late soybean harvest, winter wheat plantings (that follow soybeans in rotation) may have been reduced.

Flaxseed

Flaxseed production in 1990 is pegged at 935,000 tons, the third largest on record. This year's crop recovered after two consecutive seasons of low output due to both an area increase and favorable weather that produced the second best average yield on record. Flax is grown primarily in Saskatchewan and Manitoba, accounting for 46 percent and 45 percent, respectively, with the remaining 9 percent produced in Alberta. All three provinces harvested increased area over last year. Saskatchewan harvested nearly 22 percent more area than in 1989/90, producing 432,000 tons, up 83 percent. Manitoba

harvested an additional 15 percent from last year, and with average yield that rose 67 percent, flaxseed output was boosted 91 percent to 422,000 tons. Alberta doubled its flaxseed production over 1989/90 to an estimated 81,300 tons. Average flaxseed yield did climb by 14 percent from last year, but the major factor pushing output higher was a 75 percent increase in harvested area, to 56,700 hectares.

Sunflowerseed

Sunflowerseed is the smallest oilseed crop in Canada. At an estimated 114,700 tons during 1990, it represents just 2 percent of total oilseed output. This year's crop however, is the largest since 1981 and 67 percent over 1989/90. Total harvested area climbed to 68,800 hectares, up 26 percent from last year. Good growing conditions helped average yield reach a record 1.67 tons per hectare, 32 percent above 1989/90 and 9 percent above the old record of 1.53 tons set in 1987. Manitoba produces 91 percent of Canada's sunflowerseed, the balance is produced in Saskatchewan. Manitoba and Saskatchewan increased harvested sunflower area by 26 percent and 25 percent, respectively. Average yields improved by 31 percent in Manitoba, increasing production by 66 percent over 1989/90 to 104,300 tons. Sunflowerseed output in Saskatchewan climbed by 76 percent from last year, boosted by a 41-percent increase in average yields.

Rodney Paschal, Chairperson (202) 382-8881

1990/91 Canada Oilseeds: Harvested Area, Yield, and Production

Province	Rapeseed			Soybeans			Flaxseed			Sunflowerseed			Total	
	Hectares (1,000)	Yield (MT/Ha)	Tons (1,000)	Hectares (1,000)	Yield (MT/Ha)	Tons (1,000)	Hectares (1,000)	Yield (MT/Ha)	Tons (1,000)	Hectares (1,000)	Yield (MT/Ha)	Tons (1,000)	Hectares (1,000)	Tons (1,000)
Quebec	--	--	--	18.2	2.80	51.0	--	--	--	--	--	--	18.2	51.0
Ontario	20.2	2.13	43.1	486.0	2.63	1,276.0	--	--	--	--	--	--	506.2	1,319.1
Manitoba	384.0	1.30	499.0	--	--	--	324.0	1.30	422.0	58.7	1.78	104.3	766.7	1,025.3
Saskatchewan	1,133.0	1.28	1,451.0	--	--	--	344.0	1.26	432.0	10.1	1.03	10.4	1,487.1	1,893.4
Alberta	1,052.0	1.23	1,293.0	--	--	--	56.7	1.43	81.3	--	--	--	1,108.7	1,374.3
British Columbia	40.5	0.95	38.6	--	--	--	--	--	--	--	--	--	40.5	38.6
Total	2,629.7	1.26	3,324.7	504.2	2.63	1,327.0	724.7	1.29	935.3	68.8	1.67	114.7	3,927.4	5,701.7

TABLE 28

1990/91 Canada Oilseeds: Percent Harvested Area and Production

Province	Rapeseed		Soybeans		Flaxseed		Sunflowerseed		Total	
	Hectares	Tons	Hectares	Tons	Hectares	Tons	Hectares	Tons	Hectares	Tons
Quebec	--	--	3.6	3.8	--	--	--	--	0.5	0.9
Ontario	0.8	1.3	96.4	96.2	--	--	--	--	12.9	23.1
Manitoba	14.6	15.0	--	--	44.7	45.1	85.3	90.9	19.5	18.0
Saskatchewan	43.1	43.6	--	--	47.5	46.2	14.7	9.1	37.9	33.2
Alberta	40.0	38.9	--	--	7.8	8.7	--	--	28.2	24.1
British Columbia	1.5	1.2	--	--	--	--	--	--	1.0	0.7
Total Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Percent of All Oilseeds	67.0	58.3	12.8	23.3	18.5	16.4	1.8	2.0	100.0	100.0

January 1991

Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 29

Canada Oilseeds: Harvested Area, Production, and Yields

	Rapeseed			Soybeans			Flaxseed			Sunflowerseed			Total Oilseeds	
Year	Area	Production	Yield	Area	Production	Yield	Area	Production	Yield	Area	Production	Yield	Area	Production
69/70	814	758	0.93	130	210	1.62	947	712	0.75	--	--	--	1,891	1,680
70/71	1,639	1,638	1.00	136	283	2.08	1,341	1,218	0.91	--	--	--	3,116	3,139
71/72	2,147	2,155	1.00	149	280	1.88	715	569	0.80	--	--	--	3,011	3,004
72/73	1,343	1,318	0.98	164	375	2.29	535	448	0.84	88	77	0.88	2,130	2,218
73/74	1,297	1,224	0.94	190	397	2.09	587	493	0.84	52	41	0.79	2,126	2,155
74/75	1,279	1,164	0.91	168	301	1.79	587	351	0.60	8	12	1.50	2,042	1,828
75/76	1,829	1,839	1.01	158	367	2.32	567	445	0.79	25	30	1.20	2,579	2,681
76/77	720	837	1.16	153	250	1.63	324	277	0.86	20	24	1.20	1,217	1,388
77/78	1,453	1,973	1.36	223	580	2.60	596	653	1.10	68	81	1.19	2,340	3,287
78/79	2,825	3,497	1.24	285	516	1.81	526	572	1.09	92	120	1.30	3,728	4,705
79/80	3,406	3,411	1.00	279	657	2.36	931	815	0.88	161	218	1.35	4,777	5,101
80/81	2,080	2,484	1.19	277	690	2.49	554	442	0.80	136	166	1.22	3,047	3,782
81/82	1,402	1,849	1.32	279	607	2.18	466	468	1.00	121	165	1.36	2,268	3,089
82/83	1,777	2,225	1.25	364	848	2.33	631	752	1.19	77	94	1.22	2,849	3,919
83/84	2,334	2,609	1.12	364	735	2.02	431	444	1.03	47	51	1.09	3,176	3,839
84/85	3,071	3,412	1.11	405	917	2.26	720	694	0.96	89	96	1.08	4,285	5,119
85/86	2,783	3,498	1.26	405	1,012	2.50	740	902	1.22	71	82	1.16	3,999	5,494
86/87	2,641	3,787	1.43	384	960	2.50	755	1,026	1.36	26	36	1.39	3,806	5,809
87/88	2,671	3,847	1.44	461	1,270	2.76	591	729	1.23	34	52	1.53	3,757	5,898
88/89	3,672	4,311	1.17	533	1,153	2.16	501	373	0.75	43	48	1.12	4,749	5,885
89/90	2,904	3,096	1.07	540	1,219	2.26	598	498	0.83	55	69	1.26	4,097	4,882
90/91	2,630	3,325	1.26	504	1,327	2.63	725	935	1.29	69	115	1.67	3,928	5,702

*/ Does not include peanut production estimated at 1,000 tons in 1990/91.
**/ Area and Production in 1,000's of hectares and metric tons. Yield in metric tons per hectare.

= Largest estimate between 1969/70 and 1990/91.

January 1991

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CHART 2

Canada Oilseeds Production

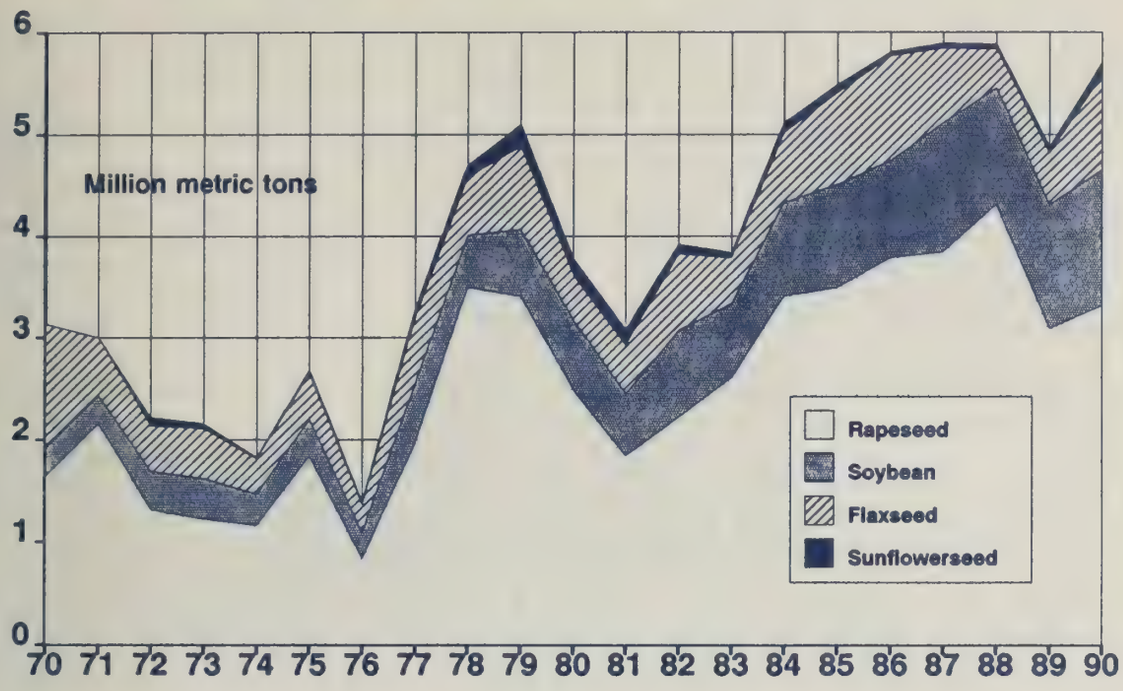
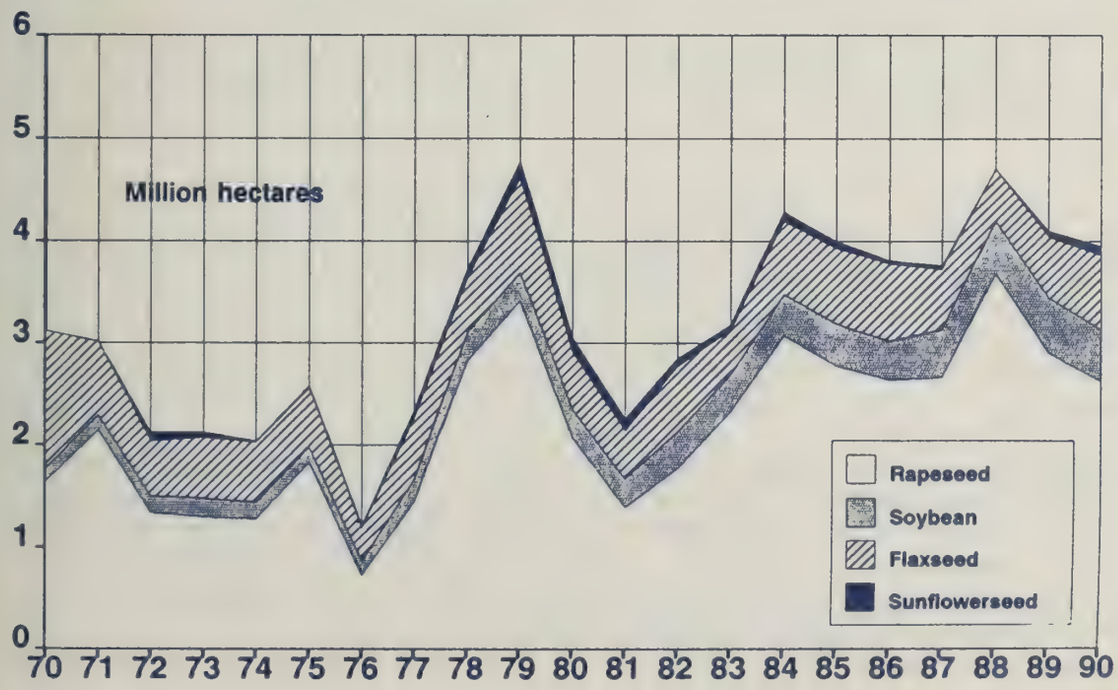


CHART 3

Canada Oilseeds Harvested Area



CORN PRODUCTION IN THE SOVIET UNION

The Soviet Union regularly produces between 13 and 16 million tons of corn, with 1990/91 production currently estimated at 14.0 million tons from 4.0 million hectares. Soviet corn grain production is centered in the Ukraine, the North Caucasus region of the Russian Republic (RSFSR), and Moldavia. About 75 percent of the area devoted to corn-for-grain is located in these regions. In the lower Volga Valley (RSFSR), the last 3 years have seen corn-for-grain area in Saratov oblast rise to 250,000 hectares, a 10-fold increase. Corn area has also been increasing in Soviet Central Asia, and this growth has come at the expense of the region's premier crop: cotton. Despite these regional increases, the nation-wide area of corn-for-grain has actually fallen over the last few years, from 4.6 million hectares in 1987 to an estimated 4.0 million hectares in 1990/91.

Soviet agronomists have spoken for years about growing corn-for-grain in the New Lands--Kazakhstan and western Siberia--and there has been extensive research in the field of adapted corn hybrids. However, corn production there is generally limited to silage and green chop. The growing season in the New Lands is too short for grain production and farmers currently do not have sufficient corn-production machinery. One U.S. seed company currently is working with farmers in western Siberia to develop a short-season corn variety appropriate for the Soviet Union. If this work proves successful, producers in Kazakhstan would obtain seed from Siberian growers. While Soviet researchers have emphasized developing new corn strains, there are a number of varieties currently planted in the western Soviet Union--Byeloyaroye Psheno, Slavgorodskaya 270, Voronezhskaya 76, Krasnodarskaya 1/49--that have been in continuous production since Khrushchev began his corn expansion program in 1955.

There has been modest improvement in corn grain yields over the last 20 years, with a record yield of 3.7 tons per hectare in 1989/90. However, the recent drive toward the adoption of western European-style farming practices, in an effort to increase and stabilize grain yields, has focused more on winter grains. Corn-grain yields remain highly dependent on weather, with significant year-to-year fluctuation.

In the spring of 1990, the Soviet Union planted over 20 million hectares of corn, but only about 20 percent of this area was harvested for grain (see table). Despite the nation's continuing need to import corn, Soviet grain producers have traditionally harvested only one-fifth of their total corn area as grain, gathering the rest as silage or green chop. While climate is generally cited as the factor that limits the amount of total corn area used for grain production, this is not always the case. In Moldavia and the southern Ukraine, for example, where 60 to 70 percent of Soviet corn grain is produced, two-thirds of the total corn area is harvested as silage and green chop, despite climatic conditions suitable for grain production. The areas devoted to corn-for-grain and corn-for-silage are determined at the time of planting; silage corn is planted at higher densities which make it impractical to divert to grain harvest. Even if a growing season were to be particularly favorable for corn, resulting in high grain yields, the area harvested for grain could not be increased significantly.

USSR: Total Corn Area, Area of Corn for Grain, Grain Yield, and Grain Production.

Year	Total Corn Planted (MHa)	Corn-for-Grain Area (MHa)	Corn Grain Yield (MT/Ha)	Corn Grain Production (MMT)
1970	21.5	3.4	2.81	9.4
1980	20.3	3.0	3.18	9.5
1985	22.4	4.5	3.21	14.4
1986	22.1	4.2	2.95	12.5
1987	22.6	4.6	3.23	14.8
1988	21.2	4.4	3.61	16.0
1989	21.5	4.1	3.71	15.3
1990 (Est.)	20.9	4.0	3.50	14.0

Sources: GOSKOMSTAT (1970-1989); USDA (1990).

In an attempt to meet the objective of increasing the production of corn for grain, agricultural planners in the Soviet Union are focusing on several methods to boost output: expansion of sown area, development of improved hybrids, modernization of cultivation practices, and improvements in mechanization. The relatively low technical level of mechanization has been identified as the factor which most greatly limits the effort to increase corn grain production. The Scientific and Technical Council of the Ministry of Automobile and Agricultural Machinery Construction has stated that the slow expansion of area under corn for grain is tied to the high cost of manual labor required for cultivation and post-harvest processing. The average labor requirement for corn production in the Soviet Union is several times higher than in the United States. During an August 1990 trip to Kazakhstan, the author of this article observed post-harvest corn-grain processing. Corn was delivered, still on the cob, to the processing yard, where it received a final hand-husking by a crew of 12 workers. The unshelled ears were then loaded into trucks to be moved to storage facilities. This particular site was not equipped to shell corn. The Soviets recognize that machinery used in corn production is inefficient, and the Technical Council has set as an immediate goal a sharp reduction in the amount of labor required for production of corn-for-grain.

The future of production of corn for grain in the Soviet Union is difficult to forecast, but several factors would suggest that both sown area and yield may increase:

- Soviet officials want to reduce the level of grain imports; self-sufficiency is the long-term goal.

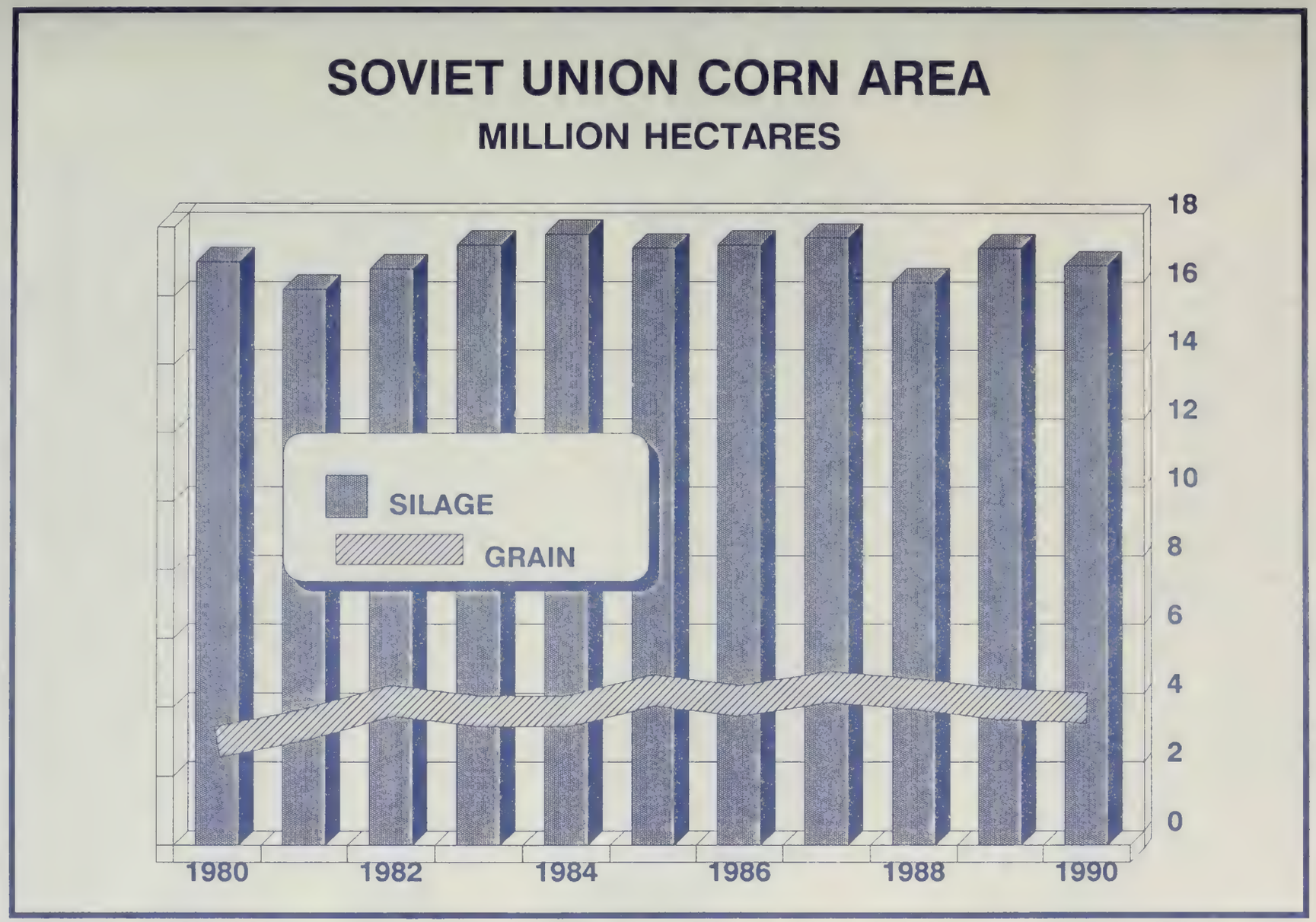
- Several U.S. companies have already signed agreements with the Soviet Union to help design and construct grain processing and storage facilities. This could lead to an improvement in grain-production mechanization and a reduction in processing time and costs

- Progress in short-season hybrid research and continued corn area expansion in Soviet Central Asia and other areas could boost production.

Despite these signals, predictions regarding the course of corn production are made cautiously. Although some conditions are favorable for increasing production, there is no guarantee that a nation-wide increase will actually occur. The multitude of economic problems facing the Soviet agricultural system must be considered.

Mark Lindeman (202) 475-5143

CHART 4



January 1990

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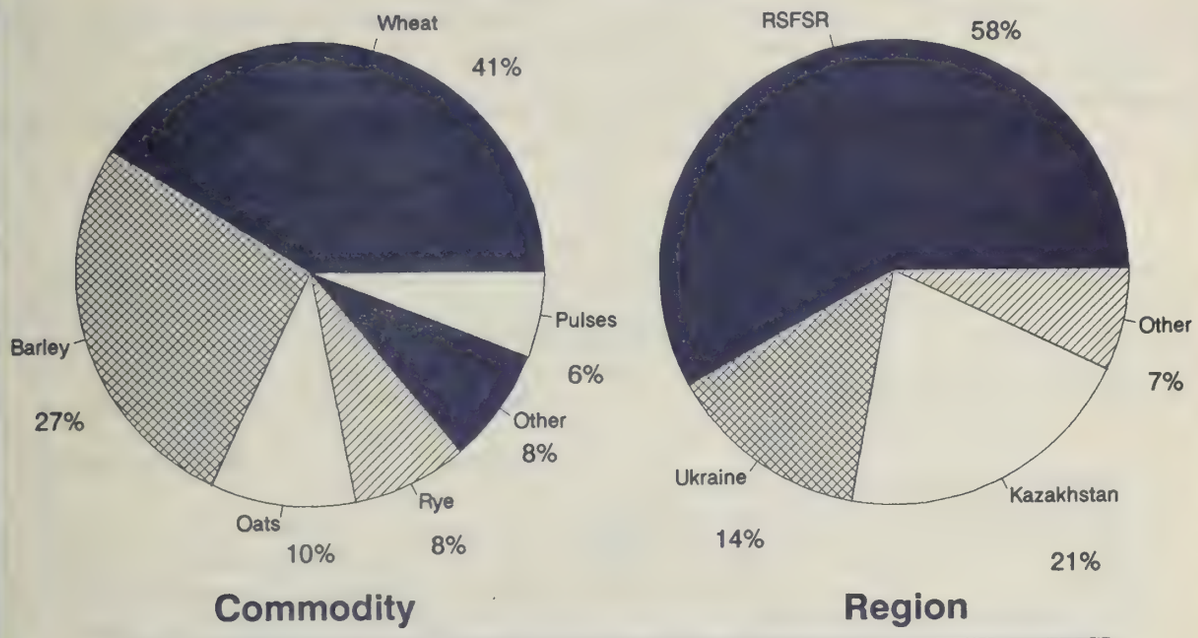
USSR TOTAL GRAIN AREA

(1985-1987 Percentages)



Production Articles This Month...

- Soviet Regional Grain Production
- Corn Production in South Africa
- Deciduous Fruit and Table Grape Situation
- Foreign Cotton Area Indications
- Dairying in Germany
- EC-12 Rapeseed Planting Intentions
- Senegalese Agricultural Production
- Indonesian Oilseeds

Approved by the World Agricultural Outlook Board - USDA

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-251), February 11, 1991.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 382-8888 or by FAX (202) 447-7729.

****
* The next issue of World Agricultural Production will be released at 3 p.m. *
* eastern time on March 12, 1991. *
****

CONVERSION TABLE

Metric Tons to Bushels		Metric Tons to 480-lb. Bales	
		Cotton	= MT*4.592917
Wheat & Soybeans	= MT*36.7437		
Corn, Sorghum, Rye	= MT*39.36825		
Barley	= MT*45.929625		
Oats	= MT*68.894438	Metric Tons to Hundredweight	
1 hectare	= 2.471044 acres	Rice	=MT*22.04622
1 kilogram	= 2.204622 pounds		

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PRODUCTION HIGHLIGHTS FOR 1990/91

February 1991

WHEAT: World production for 1990/91 is estimated at a record 589.0 million metric tons, down 4.2 million or less than 1 percent from last month, but up 10 percent from last year's harvest. Country highlights are as follows:

- **United States** — Production is estimated at 74.5 million tons, up 34 percent from last year. There was no change this month.

- **India** — Production is estimated at 49.7 million tons, down 4.3 million or 8 percent from last month, and down 8 percent from last year's record harvest. Harvested area and yield are estimated lower.

- **Australia** — Production is estimated at 15.7 million tons, up 0.2 million or 1 percent from last month and up 11 percent from last year. Excellent finishing conditions in the western growing region boosted estimated crop yields.

COARSE GRAINS: World production for 1990/91 is estimated at 825.8 million tons, up 1.9 million or less than 1 percent from last month and up 3 percent from last year. Country highlights are as follows:

- **United States** — Production is estimated at 230.6 million tons, up 4 percent from last year. There were no changes this month.

- **Brazil** — Production is estimated at 24.9 million tons, down 1.0 million or 4 percent from last month, but up 10 percent from last year. Corn yield is estimated lower due to insufficient rains during the critical silk-tassel growth stage.

- **Australia** — Production is estimated at 6.8 million tons, down 0.2 million or 2 percent from last month and down 2 percent from last year. Sorghum and corn area are estimated lower owing to drought and diversion to alternative crops, while barley and oat yields are estimated higher.

- **India** — Production is estimated at a record 35.0 million tons, up 2.7 million or 8 percent from last month and up 1 percent from last year's record harvest. Based on official Indian statistics, crop yields for sorghum, corn, and millet are estimated higher while barley is estimated lower.

- **Nepal** — Production is estimated at a record 1.4 million tons, up 0.3 million or 27 percent from last month and up 27 percent from last year. Record estimated summer corn production contributed to the upward revision.

RICE (MILLED-BASIS): World production for 1990/91 is estimated at a record 349.9 million tons, up 1.7 million or less than 1 percent from last month and up 2 percent from the 1989/90 crop. Foreign production in 1990/91 is projected at a record 345.0 million tons. U.S. output is projected at 4.9 million tons, unchanged from last month, but down 4 percent from last year. Country highlights are as follows:

- **India** — Production is estimated at a record 75.0 million tons, up 2.0 million or 3 percent from last month and up 1 percent from last year's crop. Harvested area and yield are estimated at record levels, reflecting excellent monsoonal weather.

- **Nepal** — Production is estimated at a record 2.3 million tons, up 0.3 million or 15 percent from last month and up 21 percent from last year. Above average rice plantings, along with higher yield from favorable monsoonal weather, contributed to the estimated record crop.

- **Laos** — Production is estimated at 1.1 million tons, up 0.2 million or 20 percent from last month and up 27 percent from last year. The increase is attributed to higher estimated area and yield.

- **Thailand** — Production is estimated at 12.0 million tons, down 0.9 million or 7 percent from last month and down 12 percent from last year. The reduction in yield and area is primarily based on heavier-than-expected insect damage on the main season crop and a reduction in plantings of the second crop.

OILSEEDS: Total world oilseeds production during 1990/91 is forecast at a record 216.9 million tons, down 0.2 million from last month, but up 3.0 million or 1 percent from 1989/90. Foreign production during 1990/91 is projected to be a record 156.4 million tons, down 0.2 million from last month, but up 1.7 million or 1 percent from last year. U.S. total oilseed production is estimated at 60.6 million tons, unchanged from last month, up 1.3 million or 2 percent from last year.

* **Soybeans:** World production for 1990/91 is estimated at 105.1 million tons, down 0.4 million from last month and down 1.7 million or 2 percent from last year. Total foreign soybean output is estimated at 52.8 million tons, down 0.4 million or 1 percent from last month and down 1.7 million or 3 percent from 1989/90. Country highlights are as follows:

  - **United States** — There was no change in the USDA official estimate by the National Agricultural Statistics Service this month. Production is estimated at 52.3 million tons, unchanged from last month, but down marginally from last year.

  - **Brazil** — Production is estimated at 17.5 million tons, down 0.5 million or 3 percent from last month and down 2.5 million or 13 percent from last year. As a result of field travel by the agricultural attache, Sao Paulo, and FAS staff in January, planted area has been adjusted downward. Harvested area is now expected to fall by 1.5 million hectares or 13 percent from last year.

  - **India** — Production is estimated at a record 2.1 million tons, up 0.1 million or 5 percent from last month and up 23 percent from last year's record output. Harvested area is estimated to reach a record 2.2 million hectares.

* **Cottonseed:** World production for 1990/91 is forecast at 33.7 million tons, down 0.3 million or 1 percent from last month, but up 2.3 million or 7 percent from last year. Total foreign production is estimated at 28.1 million tons, down 0.3 million or 1 percent from last month, but up 1.0 million or 4 percent above last year. Country highlights are as follows:

  - **United States** — There was no change in the USDA official estimate by the National Agricultural Statistics Service this month. Production is estimated at 5.5 million tons, up 1.3 million or 30 percent from last year.

  - **India** — Production is estimated at 4.3 million tons, down 0.2 million or 3 percent from last month and down 0.3 million or 6 percent from last year's record crop. Unfavorable harvest conditions, reduced crop area, and pest losses have affected the production outlook.

- o **Soviet Union** Production is estimated at 5.3 million tons, down 0.2 million or 3 percent from last month and down 0.1 million or 1 percent from last year. The U.S. agricultural counselor in Moscow reported a reduction in raw cotton output based on official statistics.

* **Peanuts:** World production for 1990/91 is forecast at 21.4 million tons, down marginally from last month and down 0.5 million or 2 percent from 1989/90. Total foreign production is estimated at 19.8 million tons, down marginally from last month and down 0.3 million or 1 percent from 1989/90. U.S. peanut production was unchanged this month, remaining at 1.6 million tons, down 0.2 million or 10 percent from last year. There were no significant country changes this month.

* **Sunflowerseed:** World production for 1990/91 is forecast at 21.5 million tons, down 0.3 million or 1 percent from last month and down 0.4 million or 2 percent from last year. Total foreign production is estimated at 20.5 million tons, down 0.3 million or 1 percent from last month and down 0.7 million or 3 percent from last year. Country highlights are as follows:

  - o **United States** There was no change in the USDA official estimate by the National Agricultural Statistics Service this month. Production is estimated at 1.0 million tons, up 0.2 million or 29 percent from last year.

  - o **Soviet Union** Production is estimated at 6.5 million tons, down 0.3 million or 4 percent from last month and down 0.6 million or 8 percent from last year. Official reports confirm that yields were adversely affected by the poor harvesting conditions in November.

* **Rapeseed:** World production for 1990/91 is forecast at a record 24.6 million tons, up 0.8 million or 3 percent from last month and up 2.7 million or 12 percent from last year. Country highlights are as follows:

  - o **India** Production is estimated at a record 4.8 million tons, up 0.8 million or 20 percent from last month, and up 0.7 million or 26 percent from last year. Harvested rapeseed area is expected to reach a record 5.2 million hectares, up 4 percent from last year.

* **Flaxseed:** World production for 1990/91 is forecast at 2.3 million tons, down marginally from last month, but up 0.5 million or 26 percent from last year. While production by the United States is small, this year's estimated output increased by 213 percent over last year, to 97,000 tons. Total foreign production is pegged at 2.2 million tons, down marginally from last month, but up 0.4 million or 23 percent from last year. There were no significant country changes this month.

* **Copra:** World production for 1990/91 is forecast at 4.9 million tons, up marginally from last month and up 0.1 million or 3 percent from last year. Copra production reached a record 5.3 million in 1985/86. There were no significant country changes this month.

* **Palm Kernels:** World production for 1990/91 is forecast at a record 3.4 million tons, unchanged from last month, but up nearly 2 percent from last year. There were no country changes this month.

* **Palm Oil:** World production for 1990/91 is forecast at a record 11.0 million tons, down 0.2 million from last month, but up 71,000 tons from last year. Country highlights are as follows:

  - **Malaysia** — Production is estimated at 6.2 million tons, down 0.2 million or 3 percent from last month and down 3 percent from last year. Tree-stress from an earlier dry period is expected to reduce production, particularly during the first half of the October-September marketing year.

COTTON: World cotton production in 1990/91 is estimated at 86.1 million bales, down 0.8 million or 1 percent from last month but up 6.1 million or 8 percent from last year. United States production is estimated at 15.6 million bales, unchanged from last month. Foreign production is estimated at 70.4 million bales, down 0.8 million from last month but up 2.6 million or 4 percent from the 1989/90 estimate. Country highlights are as follows:

  - **India** — Production is estimated at 9.8 million bales, down 0.3 million or 3 percent from last month, and down 6 percent from last year's record crop. Cotton yields are forecast slightly lower due to pest and weather related damage.

  - **USSR** — Production is estimated at 12.0 million bales, down 0.4 million or 3 percent from last month, and down 3 percent from last year. The reduction is attributed to recently released Soviet statistics.

  - **Peru** — Production is estimated at 0.3 million bales, down 0.1 million from last month or 27 percent from last month. Area planted of both Tanguis and extra-long-staple cotton is forecast lower. This is a result of a sharp drop in available credit this season and the low prices paid for last season.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	1990/91	1988/89	1989/90	Jan.	Feb.	1988/89	1989/90	Jan.	Feb.
	--Million Acres--			--Million Acres--			--Bushels per Acre--				--Million Bushels--			
All Wheat	65.5	76.6	77.3	53.2	62.2	69.4	34.1	32.7	39.5	39.5	1,812	2,037	2,739	2,739
Winter	48.8	55.1	57.0	39.8	41.5	50.0	39.2	35.0	40.7	40.7	1,562	1,455	2,033	2,033
Other	16.7	21.5	20.3	13.4	20.7	19.4	18.7	28.1	36.4	36.4	250	582	705	705
Rye	2.4	2.0	1.6	0.6	0.5	0.4	24.7	28.2	27.1	27.1	15	14	10	10
Soybeans	58.8	60.8	57.8	57.4	59.5	56.5	27.0	32.3	34.0	34.0	1,549	1,924	1,922	1,922
Corn	67.7	72.2	74.2	58.3	64.7	67.0	84.6	116.3	118.5	118.5	4,929	7,525	7,933	7,933
Sorghum	10.3	12.6	10.5	9.0	11.1	9.1	63.8	55.4	62.9	62.9	577	615	571	571
Barley	9.8	9.1	8.2	7.6	8.3	7.5	38.0	48.6	55.9	55.9	290	404	419	419
Oats	13.9	12.1	10.4	5.5	6.9	5.9	39.3	54.3	60.1	60.1	218	374	357	357
							--Pounds per Acre--				---Million CWT.---			
Rice	2.9	2.7	2.9	2.9	2.7	2.8	5,514	5,749	5,507	5,507	159.9	154.5	154.9	154.9
											---Million 480-Pound---			
All Cotton	12.5	10.6	12.4	11.9	9.5	11.7	619	614	640	640	15.4	12.2	15.6	15.6

1/ Source: All estimates are provided by the National Agricultural Statistics Service (NASS) of the United States Department of Agriculture, and are published in the Crop Production circular available from NASS.

World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			USSR	Asia					South America		Selected Other			All Other Countries
			United States	Canada	Mexico	EC-12	Oth. W. Europe	Eastern Europe		China	India	Indo-nesia	Paki-stan	Thai-land	Argen-tina	Brazil	Aus-tralia	South Africa	Turkey	
	—Million Metric Tons—																			
Wheat																				
1988/89	500.4	451.1	49.3	16.0	3.2	74.7	3.8	44.8	84.4	85.4	46.2	0.0	12.7	0.0	8.4	5.8	14.1	3.5	15.0	17.0
1989/90 prel.	536.8	481.4	55.4	24.6	4.0	78.3	4.4	44.3	92.3	90.8	54.1	0.0	14.4	0.0	10.2	5.6	14.1	2.0	11.5	15.5
1990/91 proj.																				
January	593.3	518.7	74.5	31.8	3.9	80.7	5.0	44.7	108.0	96.5	54.0	0.0	14.3	0.0	11.2	3.2	15.5	1.8	14.0	17.4
February	589.0	514.5	74.5	31.8	3.9	80.6	5.0	44.7	108.0	96.5	49.7	0.0	14.3	0.0	11.2	3.2	15.7	1.8	14.0	17.4
Coarse Grains																				
1988/89	731.2	581.5	149.7	19.7	13.8	88.1	11.4	61.3	97.5	94.2	31.3	5.2	2.4	4.4	7.3	26.7	6.7	13.0	10.0	88.7
1989/90 prel.	803.5	582.2	221.4	23.5	14.1	82.1	12.4	68.1	104.8	94.6	34.6	5.0	2.8	4.2	8.3	22.7	6.9	10.3	7.5	80.4
1990/91 proj.																				
January	824.0	593.4	230.6	26.0	16.3	76.9	13.3	61.4	114.0	104.7	32.3	5.3	2.9	4.0	9.8	25.9	6.9	6.8	8.9	78.0
February	825.8	595.3	230.6	26.0	16.3	76.8	13.3	61.4	114.0	104.7	35.0	5.3	2.9	4.0	9.8	24.9	6.8	6.8	8.9	78.4
Rice (Milled)																				
1988/89	330.8	325.6	5.2	0.0	0.3	1.3	0.0	0.2	1.9	118.4	70.5	27.5	3.2	14.0	0.3	7.5	0.6	0.0	0.2	23.7
1989/90 prel.	344.5	339.4	5.1	0.0	0.4	1.4	0.0	0.2	1.7	126.1	74.1	29.1	3.2	13.7	0.2	5.0	0.7	0.0	0.2	23.2
1990/91 proj.																				
January	348.2	343.3	4.9	0.0	0.3	1.6	0.0	0.2	1.7	129.5	73.0	29.2	3.5	12.9	0.3	6.7	0.5	0.0	0.2	23.2
February	349.9	345.0	4.9	0.0	0.3	1.6	0.0	0.2	1.7	129.5	75.0	29.2	3.5	12.0	0.3	6.7	0.5	0.0	0.2	23.7
Total Grains 1/																				
1988/89	1,562.4	1,358.2	204.2	35.7	17.2	164.1	15.2	106.2	183.8	298.0	148.0	32.7	18.2	18.5	16.0	40.0	21.4	16.6	25.2	201.6
1989/90 prel.	1,684.8	1,402.9	281.9	48.0	18.5	161.8	16.7	112.6	198.8	311.5	162.7	34.1	20.4	17.9	18.7	33.3	21.7	12.3	19.2	194.8
1990/91 proj.																				
January	1,765.4	1,455.4	310.0	57.8	20.4	159.1	18.3	106.3	223.7	330.7	159.3	34.5	20.7	16.9	21.3	35.8	22.9	8.6	23.1	195.9
February	1,764.8	1,454.8	310.0	57.8	20.4	159.0	18.3	106.3	223.7	330.7	159.6	34.5	20.7	16.0	21.3	34.8	23.0	8.6	23.1	196.9
Oilseeds 2/																				
1988/89	203.6	153.3	50.3	5.9	1.0	11.5	0.6	5.1	13.3	30.6	19.3	2.0	3.2	0.8	10.7	24.6	0.8	0.8	2.3	20.9
1989/90 prel.	213.9	154.7	59.2	4.9	1.4	11.0	0.7	6.0	14.0	28.4	19.4	2.0	3.3	0.9	15.9	21.4	2.4	1.0	2.3	19.7
1990/91 proj.																				
January	217.1	156.6	60.6	5.7	0.9	12.3	0.8	5.2	13.8	32.2	18.7	2.1	3.4	0.7	15.1	19.5	0.9	0.8	2.1	22.2
February	216.9	156.4	60.6	5.7	0.9	12.3	0.8	5.2	13.4	32.2	19.5	2.1	3.4	0.7	15.1	19.0	1.0	0.8	2.1	22.2
	—Million 480-Pound Bales—																			
Cotton																				
1988/89	84.7	69.3	15.4	0.0	1.4	1.6	0.0	0.1	12.7	19.1	8.3	0.0	6.5	0.2	0.9	3.4	1.3	0.4	3.0	10.5
1989/90 prel.	80.0	67.8	12.2	0.0	0.8	1.5	0.0	0.1	12.3	17.4	10.4	0.0	6.7	0.2	1.3	3.0	1.4	0.3	2.8	9.7
1990/91 proj.																				
January	86.9	71.3	15.6	0.0	0.8	1.5	0.0	0.1	12.4	19.3	10.1	0.0	7.0	0.2	1.4	3.4	1.6	0.2	3.0	10.4
February	86.1	70.4	15.6	0.0	0.8	1.5	0.0	0.1	12.0	19.3	9.8	0.0	7.0	0.2	1.4	3.4	1.6	0.2	3.0	10.3

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains and pulses are 195.1 million tons in 1988/89, 210.9 million in 1989/90, and 235.0 million forecast in 1990/91.
2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also include copra and palm kernels for all countries.
Note: Entries of 0.0 indicate no reported or insignificant production.

FEBRUARY 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 3

Wheat Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1988/89	Prel. 1989/90	Proj. 1990/91	1988/89	Prel. 1989/90	1990/91 Proj. Jan.	Feb.	1988/89	Prel. 1989/90	1990/91 Proj. Jan.	Feb.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	218.0	225.6	230.8	2.30	2.38	2.57	2.55	500.4	536.8	593.3	589.0
United States	21.5	25.2	28.1	2.29	2.20	2.66	2.66	49.3	55.4	74.5	74.5
Total Foreign	196.5	200.4	202.8	2.30	2.40	2.56	2.54	451.1	481.4	518.7	514.5
Maj. Foreign Exporters	42.1	44.3	45.6	2.69	2.87	3.05	3.06	113.1	127.2	139.2	139.3
Argentina	4.7	5.5	5.9	1.79	1.86	1.90	1.90	8.4	10.2	11.2	11.2
Australia	8.9	8.9	9.9	1.58	1.58	1.57	1.59	14.1	14.1	15.5	15.7
Canada	13.0	13.6	14.1	1.23	1.80	2.26	2.26	16.0	24.6	31.8	31.8
EC-12	15.5	16.3	15.7	4.82	4.82	5.12	5.12	74.7	78.3	80.7	80.6
Major Importers	95.9	97.2	97.9	2.39	2.50	2.69	2.69	229.3	242.5	263.1	263.1
Brazil	3.5	3.4	3.3	1.68	1.65	0.97	0.97	5.8	5.6	3.2	3.2
China	28.8	29.8	30.3	2.97	3.04	3.18	3.18	85.4	90.8	96.5	96.5
Eastern Europe	10.7	10.6	10.6	4.17	4.16	4.20	4.20	44.8	44.3	44.7	44.7
Egypt	0.6	0.6	0.7	4.76	5.05	5.71	5.71	2.8	3.2	4.0	4.0
Other N. Africa 1/	4.0	4.7	5.2	1.26	1.13	1.08	1.08	5.0	5.3	5.6	5.6
Japan	0.3	0.3	0.3	3.62	3.43	3.77	3.77	1.0	1.0	1.0	1.0
USSR	48.1	47.7	47.5	1.76	1.94	2.27	2.27	84.4	92.3	108.0	108.0
Other Foreign	58.5	59.0	59.3	1.86	1.90	1.96	1.89	108.6	111.8	116.5	112.1
India	23.1	24.1	23.5	2.00	2.24	2.28	2.12	46.2	54.1	54.0	49.7
Iran	6.6	6.0	6.1	1.11	0.97	1.00	1.00	7.3	5.8	6.1	6.1
Mexico	0.8	1.0	0.9	4.00	4.21	4.59	4.59	3.2	4.0	3.9	3.9
Non-EC W. Europe	0.8	0.8	0.9	4.85	5.19	5.46	5.46	3.8	4.4	5.0	5.0
Pakistan	7.3	7.7	7.8	1.73	1.87	1.84	1.84	12.7	14.4	14.3	14.3
South Africa	2.0	1.8	1.7	1.78	1.11	1.06	1.05	3.5	2.0	1.8	1.8
Turkey	8.8	8.7	8.8	1.71	1.32	1.60	1.60	15.0	11.5	14.0	14.0
Others	9.3	8.8	9.7	1.83	1.76	1.79	1.79	17.0	15.5	17.4	17.4

1/ Algeria, Libya, Morocco, and Tunisia.

FEBRUARY 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Jan.	Feb.	1988/89	1989/90	Jan.	Feb.
TOTAL COARSE GRAINS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World 1/	325.9	322.0	321.5	2.24	2.50	2.56	2.57	731.2	803.5	824.0	825.8
United States	32.8	37.0	36.4	4.56	5.98	6.34	6.34	149.7	221.4	230.6	230.6
Total Foreign	293.1	285.0	285.1	1.98	2.04	2.08	2.09	581.5	582.2	593.4	595.3
Maj. Foreign Exporters	20.7	21.4	20.8	2.47	2.48	2.56	2.57	51.1	53.2	53.6	53.4
Argentina	2.9	3.1	3.4	2.49	2.65	2.90	2.90	7.3	8.3	9.8	9.8
Australia	4.3	4.0	4.2	1.56	1.71	1.58	1.60	6.7	6.9	6.9	6.8
Canada	7.1	8.3	8.0	2.76	2.84	3.24	3.24	19.7	23.5	26.0	26.0
South Africa	4.6	4.4	3.6	2.86	2.32	1.88	1.88	13.0	10.3	6.8	6.8
Thailand	1.8	1.6	1.5	2.50	2.71	2.67	2.67	4.4	4.2	4.0	4.0
Major Importers	106.3	103.7	101.4	2.57	2.73	2.79	2.79	273.4	282.8	283.3	283.2
Eastern Europe	18.2	18.1	18.0	3.37	3.76	3.42	3.42	61.3	68.1	61.4	61.4
EC-12	19.2	18.6	17.7	4.60	4.42	4.35	4.35	88.1	82.1	76.9	76.8
Other W. Europe	3.2	3.1	3.0	3.52	3.97	4.40	4.40	11.4	12.4	13.3	13.3
Mexico	7.5	7.5	8.3	1.85	1.88	1.96	1.96	13.8	14.1	16.3	16.3
USSR	57.8	56.0	54.0	1.69	1.87	2.11	2.11	97.5	104.8	114.0	114.0
Other Major Import. 2/	0.5	0.4	0.4	3.40	3.34	3.32	3.32	1.5	1.4	1.4	1.4
Other Foreign	166.0	159.9	163.0	1.55	1.54	1.57	1.59	256.9	246.1	256.5	258.7
Brazil	13.4	12.7	13.6	2.00	1.80	1.91	1.84	26.7	22.7	25.9	24.9
China	28.3	28.5	29.2	3.33	3.32	3.59	3.59	94.2	94.6	104.7	104.7
India	38.7	37.7	38.9	0.81	0.92	0.82	0.90	31.3	34.6	32.3	35.0
Indonesia	2.9	2.7	2.9	1.82	1.85	1.83	1.83	5.2	5.0	5.3	5.3
Nigeria	10.1	9.9	9.7	0.84	0.82	0.78	0.78	8.5	8.1	7.6	7.6
Philippines	3.8	3.6	3.8	1.21	1.24	1.24	1.24	4.5	4.5	4.6	4.7
Turkey	4.4	4.4	4.5	2.29	1.70	1.99	1.99	10.0	7.5	8.9	8.9
Others	64.6	60.3	60.5	1.18	1.15	1.11	1.12	76.5	69.1	67.2	67.6
BARLEY											
World	78.2	74.9	73.9	2.15	2.26	2.45	2.45	167.8	169.5	181.6	181.4
United States	3.1	3.4	3.0	2.04	2.62	3.00	3.00	6.3	8.8	9.1	9.1
Total Foreign	75.1	71.5	70.9	2.15	2.25	2.43	2.43	161.5	160.7	172.5	172.3
Australia	2.2	2.4	2.5	1.48	1.73	1.55	1.59	3.3	4.1	3.9	4.0
Canada	4.2	4.7	4.6	2.46	2.50	2.93	2.93	10.2	11.7	13.5	13.5
China	3.7	3.3	3.3	1.67	1.74	1.73	1.73	6.2	5.7	5.7	5.7
Eastern Europe	4.5	4.5	4.5	3.77	4.31	4.33	4.33	17.1	19.3	19.5	19.5
EC-12	12.2	11.8	11.4	4.13	3.93	4.02	4.03	50.2	46.2	46.0	46.0
Other W. Europe	1.7	1.5	1.5	3.28	3.87	4.26	4.26	5.7	5.9	6.2	6.2
Turkey	3.3	3.4	3.4	2.12	1.46	1.76	1.76	7.0	4.9	6.0	6.0
USSR	29.7	27.6	26.0	1.50	1.75	2.19	2.19	44.5	48.5	57.0	57.0
Others	13.5	12.5	13.7	1.28	1.16	1.06	1.05	17.3	14.5	14.7	14.4

FOOTNOTES AT END OF TABLE

CONTINUED

TABLE 4 (Continued)

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Jan.	Feb.	1988/89	1989/90	Jan.	Feb.
CORN	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	125.2	126.2	127.7	3.20	3.67	3.68	3.69	400.8	462.9	469.8	470.6
United States	23.6	26.2	27.1	5.31	7.30	7.44	7.44	125.2	191.2	201.5	201.5
Total Foreign	101.6	100.0	100.6	2.71	2.72	2.67	2.68	275.6	271.7	268.3	269.1
Maj. Foreign Exporters	7.1	6.7	6.1	3.05	2.78	2.70	2.70	21.6	18.6	16.5	16.5
Argentina	1.7	1.7	2.0	2.94	3.06	3.40	3.40	5.0	5.2	6.8	6.8
South Africa	3.8	3.6	2.8	3.28	2.62	2.14	2.14	12.4	9.4	6.0	6.0
Thailand	1.6	1.4	1.3	2.63	2.86	2.85	2.85	4.2	4.0	3.7	3.7
Major Importers	22.0	21.2	21.2	3.82	3.96	3.41	3.41	83.9	83.9	72.3	72.2
Eastern Europe	7.1	7.1	6.8	3.78	4.21	3.31	3.31	26.9	29.8	22.6	22.6
EC-12	4.1	3.9	3.4	7.00	6.93	6.30	6.26	28.5	26.9	21.7	21.5
Other W. Europe	0.2	0.2	0.2	8.55	7.68	7.43	7.43	1.9	1.7	1.6	1.6
Mexico	6.0	5.8	6.6	1.68	1.68	1.82	1.82	10.1	9.8	12.0	12.0
USSR	4.4	4.1	4.0	3.62	3.71	3.50	3.50	16.0	15.3	14.0	14.0
Other Maj. Import. 2/	0.1	0.1	0.1	4.20	4.19	4.14	4.14	0.4	0.5	0.5	0.5
Other Foreign	72.6	72.1	73.3	2.34	2.35	2.45	2.46	170.1	169.3	179.5	180.4
Brazil	12.9	12.1	13.0	2.02	1.80	1.92	1.85	26.1	21.8	25.0	24.0
Canada	1.0	1.0	1.0	5.47	6.36	7.00	7.00	5.4	6.4	7.0	7.0
China	19.7	20.4	21.0	3.93	3.88	4.19	4.19	77.4	78.9	88.0	88.0
Egypt	0.8	0.8	0.9	5.20	5.37	5.41	5.41	4.3	4.5	4.6	4.6
India	5.9	5.9	5.9	1.40	1.61	1.33	1.61	8.2	9.4	8.0	9.5
Indonesia	2.9	2.7	2.9	1.82	1.85	1.83	1.83	5.2	5.0	5.3	5.3
Philippines	3.8	3.6	3.8	1.21	1.24	1.24	1.24	4.5	4.5	4.6	4.7
Zimbabwe	1.2	1.2	1.2	1.56	1.67	1.74	1.74	1.9	2.0	2.0	2.0
Others	24.4	24.5	23.7	1.52	1.50	1.48	1.49	37.1	36.7	35.0	35.3
SORGHUM											
World	42.3	41.4	40.3	1.30	1.36	1.33	1.36	55.2	56.3	53.9	54.6
United States	3.7	4.5	3.7	4.00	3.48	3.95	3.95	14.6	15.6	14.5	14.5
Total Foreign	38.6	36.9	36.6	1.05	1.10	1.06	1.10	40.5	40.7	39.4	40.1
Argentina	0.6	0.7	0.7	2.33	2.86	3.00	3.00	1.4	2.0	2.1	2.1
Australia	0.6	0.4	0.5	1.99	2.27	2.00	2.00	1.3	0.9	1.2	0.9
China	1.8	1.8	1.8	3.14	2.94	3.22	3.22	5.6	5.4	5.8	5.8
India	14.6	14.9	15.0	0.70	0.86	0.75	0.83	10.2	12.9	11.5	12.5
Mexico	1.1	1.3	1.3	2.83	2.88	2.85	2.85	3.1	3.8	3.7	3.7
Nigeria	4.4	4.4	4.4	0.80	0.80	0.75	0.75	3.5	3.5	3.3	3.3
South Africa	0.3	0.3	0.3	1.58	1.65	1.65	1.65	0.4	0.5	0.5	0.5
Sudan	5.3	3.1	3.0	0.83	0.52	0.50	0.50	4.4	1.6	1.5	1.5
Thailand	0.2	0.2	0.2	1.35	1.44	1.39	1.39	0.2	0.2	0.3	0.3
Others	9.8	9.7	9.4	1.07	1.02	1.01	1.01	10.4	9.9	9.6	9.5

FOOTNOTES AT END OF TABLE

CONTINUED

TABLE 4 (Continued)

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Jan.	Feb.	1988/89	1989/90	Jan.	Feb.
OATS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	22.1	22.7	21.6	1.70	1.84	1.98	1.99	37.5	41.7	42.9	42.9
United States	2.2	2.8	2.4	1.41	1.95	2.16	2.16	3.2	5.4	5.2	5.2
Total Foreign	19.9	19.9	19.2	1.73	1.83	1.96	1.96	34.3	36.3	37.7	37.7
USSR	10.9	10.8	10.5	1.40	1.57	1.67	1.67	15.3	16.8	17.5	17.5
Maj. Foreign Exporters	3.5	3.7	3.5	1.91	1.97	2.11	2.12	6.6	7.3	7.3	7.4
Argentina	0.4	0.4	0.5	1.27	1.44	1.33	1.33	0.5	0.6	0.6	0.6
Australia	1.3	1.1	1.2	1.40	1.44	1.38	1.42	1.9	1.6	1.6	1.7
Canada	1.4	1.7	1.5	2.18	2.08	2.33	2.33	3.0	3.5	3.5	3.5
Sweden	0.4	0.4	0.4	3.14	3.54	4.51	4.51	1.3	1.5	1.6	1.6
Other Foreign	5.4	5.4	5.2	2.28	2.24	2.46	2.45	12.4	12.2	12.9	12.9
China	0.6	0.6	0.6	1.19	1.15	1.21	1.21	0.7	0.6	0.7	0.7
Eastern Europe	1.4	1.4	1.3	2.62	2.66	2.87	2.87	3.7	3.6	3.7	3.7
East Germany	0.1	0.1	0.1	3.43	3.33	4.14	4.14	0.5	0.5	0.6	0.6
Poland	0.9	0.8	0.7	2.61	2.72	2.78	2.78	2.2	2.2	2.1	2.1
EC-12	1.8	1.7	1.6	3.11	2.78	3.10	3.09	5.5	4.7	4.9	4.9
France	0.3	0.3	0.2	3.77	3.78	3.80	3.80	1.0	1.0	0.9	0.9
West Germany	0.6	0.5	0.5	4.23	3.78	4.37	4.37	2.4	1.9	2.1	2.1
Finland	0.4	0.4	0.5	2.21	3.24	3.67	3.67	0.9	1.4	1.7	1.7
Norway	0.1	0.1	0.1	3.02	3.13	4.58	4.58	0.4	0.4	0.6	0.6
Others	1.2	1.3	1.2	1.09	1.10	1.11	1.11	1.3	1.4	1.4	1.4
RYE											
World	15.9	16.9	16.8	2.08	2.22	2.31	2.31	33.0	37.6	38.8	38.8
United States	0.2	0.2	0.2	1.55	1.77	1.70	1.70	0.4	0.3	0.3	0.3
Total Foreign	15.6	16.7	16.6	2.09	2.23	2.32	2.32	32.6	37.3	38.6	38.6
USSR	10.1	10.7	10.5	1.83	1.87	2.00	2.00	18.5	20.1	21.0	21.0
Maj. Foreign Exporter											
Canada	0.3	0.5	0.5	1.04	1.74	1.74	1.74	0.3	0.9	0.9	0.9
Other Foreign											
Eastern Europe	3.9	3.9	4.1	2.59	2.99	2.91	2.91	10.0	11.8	11.9	11.9
East Germany	0.6	0.6	0.6	2.94	3.34	3.19	3.19	1.8	2.1	2.1	2.1
Poland	2.9	2.9	3.1	2.52	2.95	2.84	2.84	7.2	8.6	8.7	8.7
Czechoslovakia	0.2	0.2	0.2	3.42	4.05	4.26	4.26	0.5	0.7	0.7	0.7
EC-12	0.9	1.0	1.0	3.05	3.31	3.46	3.46	2.9	3.2	3.3	3.3
Denmark	0.1	0.1	0.1	4.52	4.80	4.90	4.90	0.4	0.5	0.5	0.5
West Germany	0.4	0.4	0.4	4.19	4.69	4.72	4.72	1.6	1.8	2.0	2.0
Others	0.5	0.6	0.6	2.06	2.28	2.51	2.51	1.0	1.3	1.4	1.4

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.
2/ Japan, Republic of Korea, and Taiwan.

FEBRUARY 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 5

Rice Area, Yield, and Production
World and Selected Countries and Regions

	AREA			YIELD				PRODUCTION (Rough Basis)				MILLING RATE				PRODUCTION (Milled Basis)			
	1988/89	Prel. 1989/90	Proj. 1990/91	1988/89	Prel. 1989/90	1990/91 Proj. Jan.	Feb.	1988/89	Prel. 1989/90	1990/91 Proj. Jan.	Feb.	1988/89	Prel. 1989/90	1990/91 Proj. Jan.	Feb.	1988/89	Prel. 1989/90	1990/91 Proj. Jan.	Feb.
	—Million Hectares—			—Metric Tons Per Hectare—				—Million Metric Tons—				—In Percent—				—Million Metric Tons—			
World	145.5	146.8	146.4	3.4	3.5	3.5	3.5	488.7	508.8	514.5	517.1	67.7	67.7	67.7	67.7	330.8	344.5	348.2	349.9
United States	1.2	1.1	1.1	6.2	6.4	6.2	6.2	7.3	7.0	7.0	7.0	71.5	73.0	70.0	70.0	5.2	5.1	4.9	4.9
Total Foreign	144.3	145.7	145.3	3.3	3.4	3.5	3.5	481.4	501.8	507.4	510.0	67.6	67.6	67.7	67.5	325.6	339.4	343.3	345.0
Maj. Foreign Exporters	16.5	17.0	16.7	2.3	2.3	2.3	2.2	38.6	39.1	38.8	37.4	64.1	64.0	63.9	63.8	24.7	25.0	24.8	23.9
Burma	4.5	4.7	4.9	2.8	2.9	2.9	2.9	12.5	13.5	14.0	14.0	60.0	60.0	60.0	60.0	7.5	8.1	8.4	8.4
Pakistan	2.0	2.1	2.1	2.4	2.3	2.5	2.5	4.8	4.8	5.3	5.3	66.7	66.7	66.7	66.7	3.2	3.2	3.5	3.5
Thailand	9.9	10.2	9.7	2.1	2.0	2.0	1.9	21.3	20.8	19.5	18.2	66.0	66.0	66.0	66.0	14.0	13.7	12.9	12.0
Major Importers	13.0	13.8	13.6	4.3	4.2	4.3	4.3	55.8	58.3	58.4	58.4	66.1	66.0	66.0	66.0	36.9	38.5	38.5	38.5
EC-12	0.3	0.3	0.4	5.6	6.2	6.3	6.3	2.0	2.1	2.3	2.3	67.3	67.0	67.3	67.3	1.3	1.4	1.6	1.6
Indonesia	9.8	10.5	10.3	4.3	4.2	4.4	4.4	42.3	44.7	45.0	45.0	65.0	65.0	65.0	65.0	27.5	29.1	29.2	29.2
Nigeria	0.6	0.6	0.7	1.3	1.4	1.4	1.4	0.8	0.9	0.9	0.9	60.0	60.0	60.0	60.0	0.5	0.5	0.5	0.5
Republic of Korea	1.3	1.3	1.2	6.6	6.5	6.3	6.3	8.4	8.2	7.8	7.8	72.3	72.0	72.0	72.0	6.1	5.9	5.6	5.6
Other Maj. Import. 1/	1.0	1.0	1.0	2.3	2.4	2.4	2.4	2.3	2.5	2.4	2.4	65.4	65.5	65.6	65.6	1.5	1.6	1.6	1.6
Other Foreign	114.8	114.8	115.0	3.4	3.5	3.6	3.6	387.1	404.4	410.3	414.2	68.2	68.2	68.2	68.2	264.0	275.8	280.0	282.6
Australia	0.1	0.1	0.1	8.2	8.0	8.2	8.1	0.8	0.9	0.7	0.7	71.5	71.5	71.5	71.5	0.6	0.7	0.5	0.5
Bangladesh	10.2	10.5	10.6	2.3	2.6	2.5	2.6	23.3	27.0	27.0	27.2	66.7	66.7	66.7	66.7	15.6	18.0	18.0	18.1
Brazil	5.3	4.2	4.8	2.1	1.8	2.0	2.0	11.0	7.4	9.8	9.8	68.0	68.0	68.0	68.0	7.5	5.0	6.7	6.7
China	31.9	32.7	32.4	5.3	5.5	5.7	5.7	169.1	180.1	185.0	185.0	70.0	70.0	70.0	70.0	118.4	126.1	129.5	129.5
India	41.7	42.2	42.2	2.5	2.6	2.6	2.7	105.7	111.1	109.5	112.5	66.7	66.7	66.7	66.7	70.5	74.1	73.0	75.0
Japan	2.1	2.1	2.1	5.9	6.2	6.4	6.4	12.4	12.9	13.2	13.2	72.8	72.8	72.8	72.8	9.0	9.4	9.6	9.6
Philippines	3.5	3.4	3.5	2.6	2.6	2.7	2.7	9.2	8.9	9.4	9.4	65.0	65.0	65.0	65.0	6.0	5.8	6.1	6.1
USSR	0.7	0.7	0.7	4.3	3.9	4.0	4.0	2.9	2.6	2.6	2.6	65.0	65.0	65.0	65.0	1.9	1.7	1.7	1.7
Vietnam	5.8	5.9	5.9	2.9	3.1	3.1	3.1	16.8	18.4	18.0	18.0	65.0	65.0	65.0	65.0	10.9	12.0	11.7	11.7
Others	13.5	13.1	12.9	2.6	2.7	2.7	2.8	35.8	35.0	35.0	35.8	66.2	66.2	66.2	66.2	23.7	23.2	23.2	23.7

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

FEBRUARY 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Jan.	Feb.	1988/89	1989/90	Jan.	Feb.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SOYBEANS											
World	55.87	58.03	54.76	1.71	1.84	1.92	1.92	95.55	106.79	105.49	105.07
United States	23.22	24.09	22.87	1.82	2.17	2.29	2.29	42.15	52.35	52.30	52.30
Total Foreign	32.65	33.94	31.89	1.64	1.60	1.66	1.65	53.40	54.44	53.18	52.77
Maj. Foreign Exporters	16.17	16.35	14.80	1.84	1.88	1.87	1.88	29.70	30.75	28.30	27.80
Argentina	4.00	4.95	4.90	1.63	2.17	2.10	2.10	6.50	10.75	10.30	10.30
Brazil	12.17	11.40	9.90	1.91	1.75	1.76	1.77	23.20	20.00	18.00	17.50
Other Foreign	16.48	17.59	17.09	1.44	1.35	1.46	1.46	23.70	23.69	24.88	24.97
Canada	0.53	0.54	0.50	2.16	2.26	2.63	2.63	1.15	1.22	1.33	1.33
China	8.12	8.06	7.63	1.43	1.27	1.51	1.51	11.65	10.23	11.50	11.50
Eastern Europe	0.56	0.54	0.54	1.20	1.51	1.31	1.31	0.67	0.82	0.71	0.71
EC-12	0.53	0.61	0.66	3.10	3.19	2.82	2.82	1.66	1.95	1.85	1.85
India	1.73	2.13	2.20	0.89	0.80	0.95	0.95	1.55	1.72	2.00	2.10
Indonesia	1.18	1.15	1.25	1.02	0.96	0.96	0.96	1.20	1.10	1.20	1.20
Paraguay	0.85	0.98	0.98	1.90	1.53	1.63	1.63	1.62	1.50	1.60	1.60
USSR	0.76	0.83	0.84	1.16	1.15	1.10	1.10	0.88	0.96	0.92	0.92
Others	2.21	2.74	2.49	1.51	1.53	1.51	1.51	3.33	4.20	3.77	3.76
COTTONSEED											
World	33.76	32.42	33.97	0.98	0.97	1.00	0.99	32.96	31.41	33.99	33.67
United States	4.84	3.86	4.74	1.14	1.10	1.17	1.17	5.50	4.24	5.52	5.52
Total Foreign	28.92	28.56	29.23	0.95	0.95	0.97	0.96	27.46	27.17	28.47	28.15
China	5.53	5.20	5.50	1.27	1.24	1.30	1.30	7.05	6.46	7.14	7.14
India	7.34	7.33	7.70	0.49	0.62	0.57	0.55	3.60	4.54	4.42	4.27
Pakistan	2.51	2.60	2.74	1.14	1.12	1.13	1.12	2.85	2.91	3.06	3.06
USSR	3.43	3.34	3.15	1.61	1.59	1.71	1.67	5.54	5.32	5.40	5.25
Others	10.11	10.09	10.14	0.83	0.79	0.83	0.83	8.42	7.94	8.45	8.43
PEANUTS											
World	19.81	19.65	19.46	1.17	1.11	1.11	1.10	23.18	21.90	21.43	21.42
United States	0.66	0.67	0.73	2.74	2.72	2.24	2.24	1.81	1.81	1.63	1.63
Total Foreign	19.15	18.99	18.73	1.12	1.06	1.07	1.06	21.37	20.09	19.79	19.79
Argentina	0.15	0.18	0.19	1.62	2.06	2.32	2.32	0.24	0.37	0.43	0.43
China	2.91	2.96	3.05	1.95	1.79	1.90	1.90	5.69	5.30	5.80	5.80
India	8.53	8.71	8.10	1.06	0.93	0.92	0.90	9.00	8.09	7.30	7.30
Senegal	0.90	0.78	0.92	0.76	1.04	0.73	0.73	0.69	0.82	0.67	0.67
South Africa	0.15	0.09	0.08	1.07	1.35	1.25	1.25	0.16	0.12	0.10	0.10
Sudan	0.58	0.55	0.54	0.78	0.73	0.60	0.60	0.45	0.40	0.33	0.33
Others	5.92	5.72	5.86	0.87	0.87	0.88	0.88	5.13	5.00	5.17	5.17

CONTINUED

TABLE 6 (Continued)

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Jan.	Feb.	1988/89	1989/90	Jan.	Feb.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SUNFLOWERSEED											
World	14.95	15.94	16.16	1.36	1.38	1.36	1.33	20.37	21.98	21.82	21.55
United States	0.78	0.72	0.75	1.05	1.10	1.38	1.38	0.81	0.80	1.03	1.03
Total Foreign	14.18	15.22	15.41	1.38	1.39	1.36	1.33	19.56	21.19	20.78	20.51
Argentina	2.20	2.80	2.40	1.45	1.36	1.42	1.42	3.20	3.80	3.40	3.40
China	0.83	0.73	0.83	1.42	1.34	1.45	1.45	1.18	0.98	1.20	1.20
EC-12	2.16	2.11	2.55	1.84	1.66	1.60	1.60	3.99	3.50	4.08	4.08
East Europe	1.31	1.29	1.29	1.62	1.87	1.69	1.69	2.13	2.42	2.18	2.18
USSR	4.28	4.46	4.62	1.45	1.59	1.51	1.41	6.20	7.10	6.80	6.50
Others	3.39	3.83	3.72	0.84	0.88	0.85	0.85	2.87	3.39	3.12	3.15
RAPESEED											
World	17.85	17.18	17.90	1.27	1.27	1.36	1.38	22.71	21.89	23.80	24.61
Total Foreign	17.85	17.18	17.90	1.27	1.27	1.36	1.38	22.71	21.89	23.80	24.61
Canada	3.67	2.90	2.63	1.17	1.07	1.26	1.26	4.31	3.10	3.33	3.33
China	4.94	4.99	5.30	1.02	1.09	1.25	1.25	5.04	5.44	6.60	6.60
EC-12	1.84	1.66	1.96	2.81	2.96	2.92	2.92	5.17	4.92	5.73	5.72
East Europe	0.88	1.00	0.94	2.51	2.64	2.38	2.38	2.20	2.64	2.25	2.25
India	4.83	4.99	5.20	0.91	0.83	0.83	0.92	4.38	4.12	4.00	4.80
Others	1.69	1.63	1.86	0.95	1.02	1.02	1.03	1.61	1.67	1.89	1.91
FLAXSEED											
World	3.70	3.65	3.76	0.45	0.51	0.62	0.62	1.67	1.85	2.33	2.33
United States	0.09	0.07	0.10	0.45	0.47	0.95	0.95	0.04	0.03	0.10	0.10
Total Foreign	3.61	3.59	3.66	0.45	0.51	0.61	0.61	1.63	1.82	2.23	2.23
Argentina	0.54	0.58	0.58	0.86	0.90	0.83	0.83	0.46	0.52	0.48	0.48
Canada	0.50	0.60	0.73	0.74	0.83	1.29	1.29	0.37	0.50	0.94	0.94
India	1.20	1.18	1.20	0.30	0.29	0.33	0.33	0.36	0.34	0.40	0.40
USSR	1.04	0.87	0.78	0.21	0.26	0.21	0.21	0.22	0.23	0.17	0.17
Others	0.33	0.36	0.37	0.66	0.66	0.68	0.68	0.22	0.24	0.25	0.25
MAJOR OILSEEDS	*145.93*	*146.88*	*146.00*	*1.35*	*1.40*	*1.44*	*1.43*	*196.44*	*205.82*	*208.85*	*208.64*
United States	29.58	29.41	29.18	1.70	2.01	2.08	2.08	50.31	59.24	60.59	60.59
Total Foreign	116.35	117.47	116.81	1.26	1.25	1.28	1.27	146.13	146.58	148.26	148.06
COPRA	--	--	--	--	--	--	--	4.28	4.74	4.88	4.88
PALM KERNEL	--	--	--	--	--	--	--	2.91	3.37	3.43	3.43
TOTAL OILSEEDS	--	--	--	--	--	--	--	*203.64*	*213.93*	*217.15*	*216.95*
PALM OIL 1/	--	--	--	--	--	--	--	9.47	10.94	11.21	11.01

1/ Not included in total oilseeds.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 7

Cotton Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Jan.	Feb.	1988/89	1989/90	Jan.	Feb.
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	33.8	32.0	33.6	545	545	564	558	84.7	80.0	86.9	86.1
United States	4.8	3.9	4.7	694	688	718	718	15.4	12.2	15.6	15.6
Total Foreign	29.0	28.1	28.9	521	525	539	531	69.3	67.8	71.3	70.4
Maj. Foreign Exporters	13.5	13.1	13.2	749	728	764	755	46.5	43.7	46.2	45.8
Australia	0.2	0.2	0.3	1,475	1,406	1290	1,290	1.3	1.4	1.6	1.6
Central America 1/	0.1	0.1	0.1	830	834	804	804	0.4	0.3	0.3	0.3
China	5.5	5.2	5.5	751	728	764	764	19.1	17.4	19.3	19.3
Egypt	0.4	0.4	0.4	718	683	729	719	1.4	1.3	1.4	1.4
Mexico	0.3	0.2	0.2	1,209	891	913	913	1.4	0.8	0.8	0.8
Pakistan	2.5	2.6	2.7	568	560	565	556	6.5	6.7	7.0	7.0
Sudan	0.3	0.3	0.2	443	454	499	499	0.6	0.6	0.4	0.4
Turkey	0.7	0.7	0.7	882	851	976	976	3.0	2.8	3.0	3.0
USSR	3.4	3.3	3.2	805	805	854	827	12.7	12.3	12.4	12.0
Major Importers 2/	0.4	0.4	0.4	837	889	853	853	1.7	1.5	1.5	1.5
Other Foreign	15.0	14.7	15.3	306	335	336	330	21.1	22.6	23.5	23.1
Argentina	0.5	0.6	0.6	389	486	459	459	0.9	1.3	1.4	1.4
Brazil	2.4	2.2	2.1	311	300	370	353	3.4	3.0	3.4	3.4
India	7.3	7.3	7.7	245	310	286	277	8.3	10.4	10.1	9.8
Syria	0.2	0.2	0.2	667	930	872	907	0.5	0.7	0.6	0.7
Others	4.6	4.4	4.7	377	354	370	369	8.1	7.2	8.0	7.9

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

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TABLE 8

The table below presents a 9-year record of the difference between the February projections and the final estimates. Using world wheat production as an example, changes between the February projection and the final estimate have averaged 2.5 million tons (0.5 percent) and ranged from -7.3 to 6.8 million tons. The February projection has been below the final 7 times and above the final 2 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 - 1989/90 1/					
	Difference		Lowest	Highest	Below Final	Above Final
	Average	Average	Difference			
	Percent	---Million Metric Tons---			Number of Years 2/	
WHEAT						
World	0.5	2.5	-7.3	6.8	7	2
U.S.	0.1	0.0	-0.1	0.1	4	1
Foreign	0.6	2.5	-7.3	6.8	7	2
COARSE GRAINS 3/						
World	0.5	4.2	11.1	5.1	6	3
U.S.	0.1	0.2	-0.2	1.3	6	1
Foreign	0.8	4.4	11.0	5.1	4	5
RICE (Milled)						
World	1.9	5.7	13.0	1.8	8	1
U.S.	1.2	0.1	-0.2	0.1	3	1
Foreign	1.9	5.7	13.0	1.8	8	1
SOYBEANS						
World	1.7	1.6	-2.3	2.1	5	4
U.S.	1.3	0.7	-1.1	1.8	3	5
Foreign	3.2	1.3	-2.2	1.2	7	2
		---Million 480-lb. Bales---				
COTTON						
World	1.8	1.5	-5.4	2.8	6	3
U.S.	0.8	0.1	-0.1	0.3	2	6
Foreign	2.2	1.5	-5.7	2.7	6	3
UNITED STATES		-------Million Bushels-------				
CORN	0.1	6	-8	38	2	1
SORGHUM	0.1	1	0	4	0	2
BARLEY	0.5	2	-3	11	5	1
OATS	0.1	0	-2	0	2	0

1/ The final estimate for 1981/82-1988/89 is defined as the first November estimate following the marketing year and for 1989/90 last month's estimates.
2/ May not total nine if projection was the same as the final.
3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

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MAP 1

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

FEBRUARY 11, 1991

NOAA/USDA JOINT AGRICULTURAL WEATHER FACILITY

UNITED STATES

Above normal temperatures and dryness persisted over the west coast until early February when some beneficial rain fell over all but southern California. Dry, and record-setting warmth cover the northern Plains in early February, easing crop and livestock stress. Rainfall of 2 to 4 times normal were common over Gulf Coastal and Southeastern States.

SOUTH AMERICA

In south-central Brazil, significant rain in late January finally reached southern soybeans and corn, stressed by prolonged dryness into early phases of reproduction. Moisture is adequate in northern crop areas but limited in the south. In Argentina, periodic showers maintain favorable growing conditions in most summer crop areas.

EUROPE

Recent bitter cold stresses winter grains in north-central and eastern areas and may have hurt citrus in the eastern Mediterranean. Recent rain in southern Spain improves moisture conditions for wheat.

NORTHWESTERN AFRICA

Beneficial rain covers vegetative winter grains in Algeria, Tunisia and northern Morocco. Persistent dryness in southern Morocco increases crop stress.

SOUTH AFRICA

Highly beneficial rainfall covers the Maize Triangle, providing timely moisture for corn advancing through reproduction. The rain was especially helpful in the west, where planting took place past the optimal period.

WESTERN USSR

Recent bitter cold reverses January's unseasonably mild weather pattern, stressing dormant winter grains. A shallow to moderate snow cover provided adequate protection from widespread winterkill.

EASTERN ASIA

Widespread showers over southern China improve spring planting prospects, although drier weather persists over rice areas of the southern coast. Mostly dry, milder-than-usual weather covers primary winter wheat areas but northern crops remain dormant.

SOUTHEAST ASIA

Frequent showers benefit Indonesian rice but periodic dryness affects local rice and palm oil areas of Malaysia. Scattered showers bring only local relief for Philippine fall grains as generally drier-than-normal weather continues for the second consecutive month.

AUSTRALIA

Above normal January rainfall soaks Queensland's east coast sugarcane areas. Near to above average rain also helps summer crop development in northern New South Wales and improves soil moisture conditions in southeastern Australia's wheat areas.

(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 447-7917.

WEATHER BRIEFS

BRAZIL: TIMELY RAINS BENEFIT SUMMER CROP

Dec. 20, 1990 - Jan. 19, 1991 was unseasonably dry across Southern Brazil and temperatures were sometimes above normal. These conditions severely stressed flowering soybean and reproductive corn crops. Rains returned to southern Brazil during late January improving soil moisture levels and halting further deterioration of the crop. The heaviest and most widespread rains fell during the week of Jan. 27 - Feb. 2, 1991, with amounts averaging 60-109 millimeters (mm) in Parana, 57-81 mm in Mato Grosso do Sul and 25-96 mm in Rio Grande Do Sul. Dry weather returned to Rio Grande Do Sul after Feb. 3, 1991, causing some concern. Further to the north rains were locally heavy (100-250 mm) in northern Sao Paulo and southwestern Minas Gerais. Since Jan. 20, 1991 temperatures have been normal to slightly below normal due to the rains.

NORTHWEST AFRICA: MOSTLY BETTER THAN LAST YEAR

Most of Northwest Africa's winter grain areas received normal to above normal precipitation in December 1990, giving the 1991 winter grain crop a much better start than the 1990 winter grain crop. Last year winter grains were hurt by persistent dryness across Morocco and inland Algeria. Only Tunisia received widespread precipitation in January - February 1990. Precipitation has been rather widespread and beneficial during Jan. 13 - Feb. 10, 1991 for most of Northwest African vegetative winter grain crop. The notable exception is southern Morocco which has been dry since early January 1991.

SOUTH AFRICA: RAINS IMPROVE OUTLOOK IN MAIZE TRIANGLE

Heavy rains fell across the Maize Triangle for the period of Jan. 11 - Feb. 10, 1991. Precipitation for this period was heaviest in the western two-thirds of the Maize Triangle, unlike December and early January when rain was heaviest in the east and the west was mostly dry. The frequent, soaking rains have greatly improved conditions for vegetative to filling corn across the region, especially in the west where planting took place past the optimal period. Temperatures have been normal to slightly above normal.

PRODUCTION BRIEFS

TURKEY: TREE NUT PRODUCTION UPDATE

Current assessments indicate that Turkey's 1990/91 pistachio crop totaled only 5,000 tons (inshell basis), unchanged from the preliminary estimate last September, but down sharply from the 25,000 ton 1989/90 harvest. The drop from the previous year is attributed to dry weather during the growing season compounding yield losses caused by the alternate-year bearing tendency of the crop. Estimated 1990/91 filbert production--at 380,000 tons (inshell basis)--is also unchanged since September. Filbert (hazelnut) yields also suffered from the biennial cycle following a 520,000-ton 1989/90 harvest. Production might have been even lower if the crop had not enjoyed favorable growing conditions.

FRANCE: WALNUT PRODUCTION UPDATE

The U.S. agricultural counselor in Paris reports that French 1990/91 walnut production is estimated at 26,000 tons (inshell basis)--unchanged from the September forecast, but slightly below the revised 1989/90 crop of 27,500 tons mostly due to a decline in harvested area. Estimated production for 1988/89 has also been revised and is now placed at 22,800 tons.

SPAIN: TREE NUT PRODUCTION UPDATE

Spain's 1990/91 almond production is estimated at 55,000 tons (shelled basis) 5,000 tons below the September estimate and 35,000 less than the bumper 1989/90 harvest. The reduction since September is attributed to a lower-than-usual kernel yield per ton of nuts cracked. The difference from a year ago was caused by both the biennial yield cycle and by an irregular blossom set and March-April frosts. Filbert production is estimated at 21,000 tons (inshell basis), 4,000 tons below both the September estimate and the revised 1989/90 harvest estimate. Poor nut fill and rain damage during harvesting are blamed for the reduction since September.

ITALY: TREE NUT PRODUCTION UPDATE

Late season assessments indicate that Italy's 1990/91 almond crop totaled 21,000 tons (shelled basis), 1,000 tons less than estimated in September, but still the largest crop since 1986/87. Crop quality is reportedly below average due to small kernel size. Filbert production is estimated at 80,000 tons (inshell basis), 20,000 tons or 20 percent below the September estimate and 43 percent less than the 1989/90 harvest. A cyclical yield fluctuation is blamed for the small crop. Production estimates for both walnuts (18,000 tons inshell basis) and pistachios (300 tons inshell basis) are unchanged since September.

BRAZIL: 1991/92 COFFEE PRODUCTION FORECAST DOWN

Brazil's 1991/92 coffee crop is forecast at 25 million 60-kilogram bags, 19 percent (6 million bags) less than last year's 31 million bag harvest, based on a report by the U.S. agricultural counselor in Brasilia. The report was prepared following January 8-24 field travel taken in the major producing states. No new plantings of coffee seedlings or deep pruning was observed in Parana or Sao Paulo. In Parana, the majority of coffee trees are in their off-year production cycle. Below normal rainfall and longer than normal periods between showers have significantly reduced cherry development in that state. In western and northern areas of Sao Paulo, most coffee trees have had no flowerings while elsewhere in the state most trees have had two major and one minor flowering followed by satisfactory cherry setting. Moderate weevil infestations were noted on central and eastern Sao Paulo trees.

The state of Minas Gerais is the country's largest producing state. In the southwest area, where most of the coffee is grown, coffee trees show good vegetative growth reflecting adequate rainfall with no evidence of rust or insect infestations. Most trees have had at least one major flowering and a second flowering is expected through mid-February. In this region an on-year production cycle will occur in the 1991/92 season. The remaining fourth of Minas Gerais' coffee is produced in the southeast. The state of Espirito Santo was not included in the field trip but is reported to have had adequate rainfall during and following coffee flowering and cherry set.

SOVIET UNION: SUGAR ESTIMATES REVISED DOWN

Sugar production in the Soviet Union for 1990/91 has been lowered to 9.15 million tons (raw value), 4 percent less than last year, according to information from the U.S. agricultural counselor in Moscow. Reported harvest of sugarbeets amounted to 81.2 million tons compared with 97.4 million tons last year. The beet yield per hectare, at 24.7 metric tons, was down from the 29.1 tons per hectare obtained in the 1989/90 harvest.

CANADA: NEW FARM "SAFETY NET" PROGRAMS ANNOUNCED

The Canadian agriculture minister announced two new voluntary farm subsidy programs that would provide price protection for grain and oilseed farmers and help stabilize farm incomes. Although these new farm income stabilization schemes have been announced for the 1991 crop year, the implementing legislation has not yet been tabled in Parliament. The Gross Revenue Insurance Plan will be delivered through crop insurance agencies with premiums being shared by the federal Government (42 percent anticipated), farmers (33 percent anticipated), and provincial Governments (25 percent anticipated). This program would guarantee the farmer a target revenue on a dollar per acre level, based on long-term average yields of the participating crop. The Net Income Stabilization Account will enable farmers to set aside money in individual accounts, with both the federal and (some) provincial Governments also contributing to the account. Farmers could contribute up to 2 percent of their net sales, matched by the Government. Farmers would make withdrawals from the account once net income falls below their 5 year average return, or when their taxable income falls below a pre-determined level (expected to be about Can$10,000). The programs are similar in that premiums are paid into the programs and benefits are paid back to the participant when prices or incomes drop below a certain level.

BRAZIL: 1989/90 SOYBEAN PRODUCTION ESTIMATE INCREASED

The estimate of last year's (1989/90) Brazilian soybean production has been raised from 19.3 to 20.0 million tons, according to the U.S. agricultural officer in Sao Paulo, Brazil. Industry and government estimates for the crop currently fall within the 19.7 to 20.4 million ton range, indicating higher yields were achieved by the dry weather-stressed 1989/90 crop than earlier calculated. The revised production estimate is more consistent with crush and export data (including export registrations). Low producer prices, an over-valued cruzeiro, and high transportation costs led farmers to delay moving last year's crop to market, resulting in the under-estimation of total crop size. The recent devaluation of the cruzeiro improved producer prices and led to the emergence of soybeans previously not counted by production estimators.

CHINA: WARM WINTER THREATENS WHEAT CROP

The China Daily newspaper reported that a dry, warm winter is threatening the growth of the winter wheat crop in the northern China provinces of Hebei, Shanxi, Gansu, and Shaanxi. According to a Ministry of Agriculture official, the warm winter caused the wheat crop to grow faster than usual and have a shorter than normal 'hibernation', resulting in a weaker crop. Officials also fear that the warm winter might allow more pests to survive the winter and rust diseases to spread this spring. Information from the World Meteorological Organization and the NOAA/USDA Joint Agricultural Weather Facility confirm the Chinese report of a warm winter in northern China this year. Average temperatures were 1 - 3 degrees C. above normal in October and 2 - 4 degrees C. above normal in November, with the warmest readings in Shandong, Hebei, and Shaanxi provinces. The temperatures fell in December and dropped to below-normal levels in early January, but for the past 30 days temperatures in northern China have again averaged 1 - 4 degrees C. above normal and the trend seems likely to continue throughout February.

CZECHOSLOVAKIA: MILK PRODUCTION DOWN SLIGHTLY

Czechoslovakia's 1990 milk production totaled 7.044 million tons, down 1 percent from the 1989 level, according to the U.S. agricultural counselor in Vienna, Austria. Cow numbers were down about 1 percent, continuing a long term downtrend. Despite reduced milk production, a decline in fresh consumption allowed a small increase in the quantity of milk used for processing. Output of butter for 1990 is estimated at 157,000 tons, up from 156,000 a year earlier, while cheese production is estimated at 150,000 tons, down 2,000 from 1989.

SOVIET UNION: LIVESTOCK PRODUCTION RESULTS REPORTED

Total 1990 Soviet meat production was 19.9 million tons, down 1 percent from the 1989 output of 20.1, according to recently released Soviet statistics reported by the U.S. agricultural counselor in Moscow. Milk output was reported at 108.7 million tons, up slightly from 1989 output of 108.5 million tons, and egg production, at 82 billion eggs was down 3 percent from the 84.9-billion-1989 lay. Wool output was down 8,000 tons to 479,000 in 1990. Production of meat by private producers declined even more than the national average. Privately produced milk was up 2 percent while output of eggs was down 1 percent. Governmental procurements were reported to have declined even more than production.

SOVIET UNION: 1990 GRAIN PRODUCTION REPORTED

The USSR economic results for 1990 were published by the State Committee for Statistics (GOSKOMSTAT) in January 1991 according to the U.S. agricultural counselor in Moscow. The published figures include total grain production of 218 million tons and total grain yield of 1.99 tons per hectare, on a net-weight basis (the weight of the grain after cleaning and drying). Soviet grain production numbers usually are reported in terms of "bunker" weight (the weight of the grain before adjustment for moisture and trash), which complicates the comparison between this year's results and previous years' results. For the 10 observations for which data are available for previous years, net weight ranges from 91.7 to 93.7 percent of bunker weight. The announced 1990 grain harvest of 218 million tons is close to the record 222.5 million tons (net weight) produced in 1978, and the yield of 1.99 tons per hectare surpasses the 1.73 tons per hectare level of 1978. USDA grain estimates are in the traditional bunker weight and remain unchanged pending receipt of additional sufficient information to provide estimates by grain type.

USSR Grain Production and Yield

	Production (Million Tons)		Yield (Tons/Hectare)	
	1989	1990	1989	1990
Total Grain (net weight)	196.7	218.0	1.75	1.99
Wheat (net weight)	N/A	N/A	1.83	2.11
Corn (bunker weight)	15.3	9.8	3.71	3.47
Millet (net weight)	3.7	3.3	1.35	1.12
Buckwheat (net weight)	1.1	1.4	0.66	0.75
Rice (net weight)	2.3	2.2	3.43	3.50

Grain production declined in 1990 in Ukraine, Moldavia, Belorussia, Lithuania, Estonia, and Kirgiz (in Soviet Central Asia), but increased in the Russian Republic (RSFSR) and Kazakhstan.

USSR Grain Production by Republic

Republic	1989	1990
	(Million Tons, Net Weight)	
RSFSR	104.8	116.8
Ukraine *	51.2	N/A
Kazakhstan	18.8	28.5
Other	21.9	N/A
Total	196.7	218.0

* Ukraine production figure for 1990 was below 1989. Final figure not currently available.

FEATURE COMMODITY ARTICLES

SOVIET REGIONAL GRAIN PRODUCTION

The 1990 USSR total grain crop estimate of 235 million tons includes 108.0 million of wheat, 114.0 million of coarse grains, and 1.7 million of milled rice. This year's record grain yields have moved the Soviet Union into third place among world grain producers, behind China and the United States. The Soviet Union's position as the world's largest producer of wheat, barley, oats, and rye, is based on diverse agroclimatic zones and extensive agricultural land resources.

Laws passed in the last 2 years have altered the structure of Soviet agriculture and have dramatically increased the scope of local authority. Because of this, there is greater interest by grain analysts in studying grain production at republic/regional levels. This report is based primarily on official Soviet data averaged for the late 1980's. Regional grain crop geography is presented, and grain production in the "heartland", herein defined as the RSFSR (Russian Soviet Federated Socialist Republic), Ukraine, Belorussia, and Kazakhstan republics, is compared with that in several other regions -- the Baltics, Transcaucasus, Central Asia, and Moldavia.

The heartland republics dominate grain production, accounting for 95 percent of total grain area and 93 percent of total output. The RSFSR alone produces slightly over half of all Soviet grain, while the Ukraine, Kazakhstan, and Belorussia contribute 24, 13, and 4 percent, respectively.

Wheat

The USSR is a major producer of both winter and spring wheat, with the latter accounting for a third to half of total wheat output, depending on weather. Spring wheat yields are often less than half that of winter wheat although spring wheat normally comprises 60-65 percent of total Soviet harvested wheat area.

Virtually all spring wheat is grown in two republics of the heartland. The RSFSR grows about 60 percent of Soviet spring wheat and Kazakhstan harvests most of the remainder. In the RSFSR, the regions of West Siberia and Urals are the dominant production regions, each producing about 18 percent of the National total in an average year. In West Siberia, Altai Krai, Novosibirsk, and Omsk Oblasts are the primary growing areas. In the Ural region, production centers in Orenburg, Bashkir, and Kurgan oblasts. Other important RSFSR spring wheat areas are Saratov oblast and the Tatar autonomous republic in the Volga Valley and Krasnoyarsk oblast in East Siberia.

The heartland produces over 90 percent of Soviet winter wheat. The RSFSR and the Ukraine each contributes roughly 40 percent of total winter wheat output, with the latter normally ranking first in production; Kazakhstan and Belorussia harvest about 5 and 1 percent, respectively. In other republics, Moldavia, Azerbaidzhan (Transcaucasus), Kirghiz Soviet Socialist Republic (SSR), Uzbek SSR (Central Asia), and Lithuania SSR (Baltics) each produce roughly 0.2-1.0 million tons of winter wheat annually.

In years of average weather, the Ukraine grows roughly 20 million tons of winter wheat - together with 50,000 tons of spring wheat. Every oblast, with the exception of Zakarpatsk, Ivano-Frankov, and Chernovtsy, crops 150,000-375,000 hectares of winter wheat. Greatest winter wheat production is in the following oblasts, each producing roughly 1.0 million tons: Odessa, Vinitsa, Kharkov, Poltava, Kiev, Khmelinitsa, Kherson, and Crimea.

In the RSFSR, most winter wheat is grown in the North Caucasus region which produces about 20 percent of the total Soviet harvest. Production centers in the oblasts of Krasnodar, Stavropol, and to a lesser extent -- Rostov. The Central Black Soil region of the RSFSR commonly harvests about 9-10 percent of Soviet winter wheat; important oblasts are Voronezh, Kursk, and Byelgorod. Other primary winter wheat oblasts in the RSFSR include: Volgograd, Kuibishev, Penza, and Saratov (Volga Valley); Gorkii (Volga Vyatsk); and Orlov, Ryazan, Moscow, and Tula (Center). Kazakhstan will harvest 1.5-2.0 million tons of winter wheat in average years with production mainly in Dzhambul and Chimkent oblasts.

Coarse Grains

Soviet heartland republics grow about 94 percent of the nation's coarse grains, with the RSFSR, Ukraine, and Kazakhstan contributing roughly 60, 15, and 15 percent, respectively. Significant coarse grains production outside the heartland includes barley in the Baltics (spring), Azerbaidzhan (winter), Kirghiz (spring), and Uzbek (winter) and corn in Moldavia.

Barley

Roughly 90 percent of all barley grown in the USSR is produced in the heartland. The RSFSR, Ukraine, Kazakhstan, and Belorussia harvest about 49, 22, 13, and 7 percent of total barley output, respectively. Soviet barley is predominantly (92-94 percent) spring barley.

The RSFSR grows about half of Soviet spring barley with the Volga Valley being the central production area - often harvesting an area of more than 4.0 million hectares. Primary Volga Valley oblasts for spring barley are Saratov and Volgograd. The Ural region, with about 3.0 million hectares of spring barley, centers production in the oblasts of Orenburg and Bashkir. Other important RSFSR spring barley regions (oblasts) include: North Caucasus/2.1 million hectares (Rostov); Central Black Soil/1.9 million hectares (Tambov); and Central/1.8 million hectares (Tula, Ryazan, Orlov).

The Ukraine annually produces 7-12 million tons of spring barley with yields fluctuating between 2.0 and 3.0 tons per hectare. Most area is harvested in Donetsk, Kirovograd, Zaporozhe, Dnepropetrovsk, and Nikolayev oblasts. Kazakhstan harvests about 6.5 million hectares of spring barley with yields averaging only 1.0 ton per hectare. The oblasts of Aktyubinsk, Kustanai, Uralsk, and Tselinograd each crop 0.5-0.9 million hectares of spring barley.

Soviet winter barley amounts to roughly 3.0 million tons grown on 1.5 million hectares. Important winter barley regions (oblasts) include: RSFSR/North Caucasus (Krasnodar, Stavropol); Ukraine (Crimea, Odessa); Kazakhstan (Chimkent); and Central Asia/Uzbek SSR.

Rye

The heartland republics produce 95 percent of the total Soviet rye crop. The Baltic republics contribute virtually all the remainder with Lithuania being the largest producer. Spring rye is harvested on less than 50,000 hectares out of a total rye area of 10.0-10.5 million hectares.

The RSFSR accounts for about 70 percent of all Soviet rye with an area of roughly 7.3 million hectares. The Volga Valley harvests the greatest rye area among the regions of the RSFSR - about 1.8 million hectares. The Tatar ASSR (Autonomous Soviet Socialist Republic) and Penza, Saratov, and Ulyanovsk oblasts are major Volga rye producers. Orenburg and Bashkir oblasts in the Ural region each harvest roughly 0.4 million hectares of winter rye as does Kirov oblast in the Volga Vyatsk region. The Central region of the RSFSR grows rye on about 1.3 million hectares; Ryazan and Bryansk are important rye producing oblasts.

Rye and barley are the dominant grains in Belorussia, each grown on approximately 1.0 million hectares. With 16-18 percent of total Soviet production, Belorussian rye cultivation is rather evenly spread throughout the region with roughly 150,000 hectares in each of the 6 oblasts.

The oblasts of Chernigov, Zhitomir, and Volyn grow almost half of the Ukraine's 0.6 million hectares of rye. Yields in the Ukraine average about 2.0 tons per hectare, intermediate between those near 1.0 (Central Asia and Azerbaidzhan) and those near 3.0 (Belorussia and the Baltics).

Oats

The Soviet heartland produces 97 percent of the total oats output; the Baltic republics produce the remainder. The RSFSR grows about 80 percent of Soviet oats production on approximately 10.0 million hectares. Oats yields are somewhat lower than rye in the USSR but tend to follow the same pattern regionally - lowest in Central Asia and Kazakhstan and highest in Belorussia and the Baltics. West and East Siberia together harvest roughly 4.0 million hectares of oats with greatest concentration in the following oblasts: Altai and Novosibirsk (West) and Krasnoyarsk and Chitinsk (East). Oats is a common crop in Ural region crop rotations and occupies about 1.7 million hectares. Perm and Chelyabinsk oblasts each crop about 0.3 million hectares of oats. The RSFSR's Central region also grows oats on roughly 1.7 million hectares and this grain is most significant in Kalinin and Smolensk oblasts.

The Ukraine produces about 1.5 million tons of oats on 0.65 million hectares, 10 percent of total Soviet output. Almost all of the 25 Ukrainian oblasts harvest 50,000-75,000 tons of oats annually although Chernigov, Sumy, Voroshilovgrad, and Nikolayev take in 125,000-150,000 tons each. Other important regions (oblasts) include: Kazakhstan (Kustanai and North Kazakh), Volga Vyatsk (Kirov), Belorussia (Mogilev), and Baltics (Lithuania SSR).

Corn

Although the USSR harvests as much as 375 million tons of corn-for-silage and green feed, on roughly 20 million hectares, corn-for-grain output normally varies from 12-16 million tons from 4.0-5.0 million hectares. The Soviet heartland accounts for roughly 87 percent of total grain corn production (versus 94 percent of fodder corn).

The Ukraine produces about 56 percent of Soviet grain corn on an area of approximately 2.4 million hectares, with yield averaging slightly more than 3.0 tons per hectare. Dnepropetrovsk oblast is the main producer with a harvested area of 350,000-400,000 hectares; Zaporozhe, Kirovograd, and Donetsk oblasts each crop 200,000-250,000 hectares.

The RSFSR harvests about a quarter of Soviet grain corn, with area and yield of approximately 1.4 million hectares and 2.5 tons per hectare, respectively. Almost 75 percent of the RSFSR's grain corn area is cultivated in the North Caucasus oblasts of Rostov (0.4 million hectares), Krasnodar, and Stavropol. Other important oblasts include Volgograd (Volga Valley) and Voronezh (Black Soil).

In areas outside the heartland, Central Asia grows about 6 percent of Soviet grain corn, followed by Moldavia (4 percent) and Transcaucasus (2 percent). Yields in these areas tend to be higher than the national average, particularly in the Central Asian republics of Kirghiz (6.5 tons per hectare) and Tajik (5.0-5.5).

Millet

Soviet millet production averages 3.3 million tons annually from 2.7 million hectares. All millet is grown in the heartland regions; the RSFSR, Ukraine, and Kazakhstan contribute 66, 19, and 15 percent of total production, respectively. Yields vary from 0.7 tons per hectare in Kazakhstan to 1.2 in the RSFSR and 1.8 in the Ukraine.

In the RSFSR, millet is cultivated on roughly 1.7 million hectares, mostly in the Volga Valley oblasts of Saratov (0.4 million hectares), Volgograd, and Kuibishev. Other important millet-producing oblasts include: Stavropol and Rostov (North Caucasus); Orenburg (Ural); and Voronezh (Black Soil).

Millet in the Ukraine is grown primarily in the center-west, with 11 of the 25 oblasts cropping more than 20,000 hectares; none, however, normally harvests more than 40,000 hectares. Kazakhstan's 650,000 hectares of millet is centered in the oblasts of Pavlodar, Kustanai, and Aktyubinsk.

Buckwheat

All buckwheat production (roughly 1.5 million tons on 1.1 million hectares) is in the heartland with the RSFSR and the Ukraine accounting for 60 and 35 percent of total output, respectively. Important oblasts include: Orlov, Tula, and Ryazan (Central); Kursk (Black Earth); Tatar ASSR (Volga Valley); Bashkir (Ural); Altai (West Siberia); Amur (East Siberia); Sumy (Ukraine); and Pavlodar (Kazakhstan).

Pulses

Pulses, overwhelmingly dry peas, are virtually all grown in the homeland regions. Average Soviet annual pulse output approximates 8.0 million tons on 6.0-6.5 million hectares. The RSFSR crops about 62 percent of the total area with greatest concentration in the following oblasts/republics: Voronezh (Black Soil); Tatar ASSR (Volga Valley); Bashkir (Ural); and Altai (West Siberia).

The Ukraine cultivates roughly 1.6 million hectares of pulses annually; oblasts harvesting more than 100,000 hectares are Poltava, Vinitsa, Kiev, khmelinitsa, Cherkassk, and Odessa.

Rice

The Soviet Union is a minor rice producer with an annual late 1980's output, milled-basis, of 1.7 million tons from 0.65 million hectares. The heartland republics harvest slightly more than three-quarters of total production. Average yields are highest in the Ukraine and Kazakhstan, roughly 3.3 tons per hectare.

Krasnodar oblast in the North Caucasus region of the RSFSR crops almost a quarter of Soviet rice hectarage; Rostov oblast and Dagestan ASSR each harvest roughly 25,000 hectares of rice. The only other RSFSR oblast with significant rice production is Astrakhan, in the Volga Valley economic region. Other heartland oblasts emphasizing rice are Primorsk (Far East), and Kzyl-orda and Chimkent (Kazakhstan). In areas outside the Soviet heartland, Uzbek SSR in Central Asia produces about 0.5 million tons annually on 150,000 hectares.

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MAP 2

Economic Regions in the Soviet Union

800808 (545499) 12-86

MAP 3

55068 12-66

CORN PRODUCTION IN SOUTH AFRICA

South Africa is the largest producer of corn in Africa. It is normally a major competitor for corn exports. This year's crop area is estimated to follow a declining trend of over half of the total grains planted to corn (52 percent), while nearly 30 percent of the total estimated harvested area is devoted to wheat. Harvested corn area for 1990/91 is estimated at 2.8 million hectares, down 0.8 million hectares or 22 percent from 1989/90. Corn production for 1990/91 is estimated at 6.0 million tons, down 3.2 million or 35 percent from last year.

Summer rainfall in the east started on time, but was below normal. Rainfall for the rest of the country was well-below normal until January. As a result, the crop area has been drastically reduced and production is estimated to be cut by one-third. As seen in the accompanying weather charts, only a few pockets of near normal precipitation fell during the normal planting period in the corn production regions of Transvaal and Natal from October to December. In addition, the temperature was above normal, causing additional stress to the crop.

Production is concentrated in the "maize triangle" of northwest and northeast Orange Free State (32 percent of total production), western Transvaal (29 percent), and the Transvaal regions referred to as the Eastern Transvaal Highveld (9 percent), and Rand (3 percent). White corn, which is used largely for human consumption, is planted in the eastern triangle. Yellow corn, used mainly for animal feed, is grown in the western triangle. This year, the Government announced that yellow corn would be mixed with white corn (at a ratio of 15 percent yellow to 85 percent white) in order to stretch supplies for human consumption. This has been done during previous crop shortfalls and although not popular with consumers, it is considered to be the only alternative.

Historically, yields have been widely variable. In 1982/83, the average corn yield was 1.0 ton per hectare, while in 1988/89, the yield was estimated at 3.28. The main factor affecting yields in the past has been weather during the silk/tassel period of January/February; however, this year the farmer had to contend with a drier-than-normal period during the planting season. In addition, the late planting means that much of the crop has yet to go through the critical silk/tassel stage.

Corn is normally sown from October to mid-December, reaches the silk/tassel stage in January/February, and matures in April/June. The crop is allowed to dry in the field since little drying equipment is available. This year, plantings were reported to be as late as the middle of January, due to insufficient rainfall. The crops that were planted in January are estimated to have a low yield potential and much of the late plantings may not be harvested as grain, but used as fodder. Weather in the coming weeks will determine how the corn will be utilized. In the western areas, a record (for late plantings) 480,000 hectares were reported planted between December 31 and January 15. In addition, a large portion of the corn crop was planted about 2 to 6 weeks late. Rather than having corn mature and dry in the fields in March/April, as it normally would, the late planted corn will still be in the grain filling stage during this period, and subject to risks from frost, cold weather, and diminishing rains.

Area has been steadily declining as South Africa attempts to stabilize grain production, particularly corn. The Government started a land diversification program in 1988, but only 568,000 hectares have been pulled into the program up to January 1991. Farmers are reacting rather coolly toward this program since many farmers are experiencing debt problems which make it difficult to move into livestock. Another facet of the program is that production is more a function of erratic yields rather than area. Therefore, reducing area will not affect production as much as the yearly fluctuations in yields as evidenced by the 4 million ton and 12 million ton corn crops in 1983/84 and 1988/89, respectively.

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MAP 4

Monthly Percent of Normal Precipitation, October 1990 - Janauary 1991

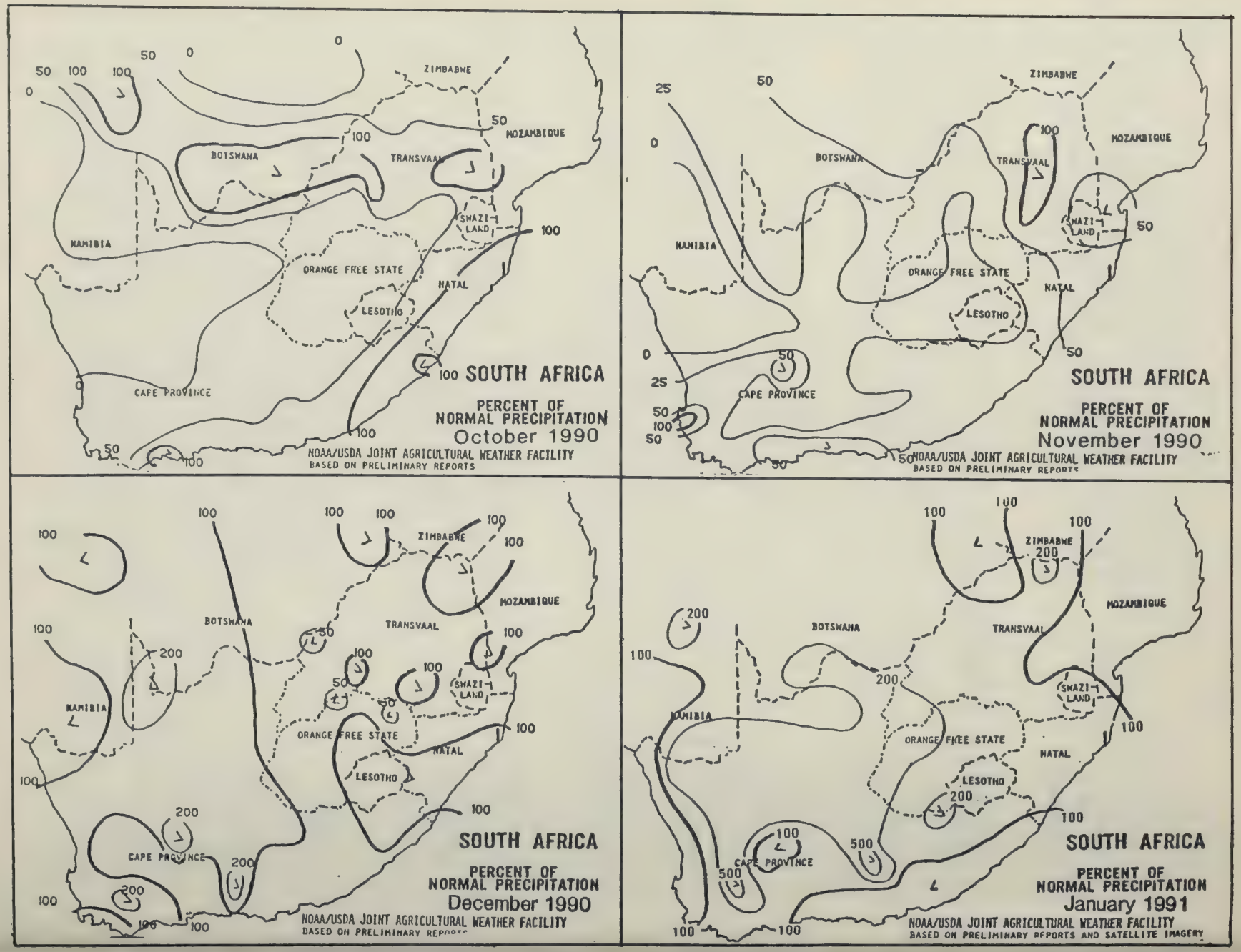
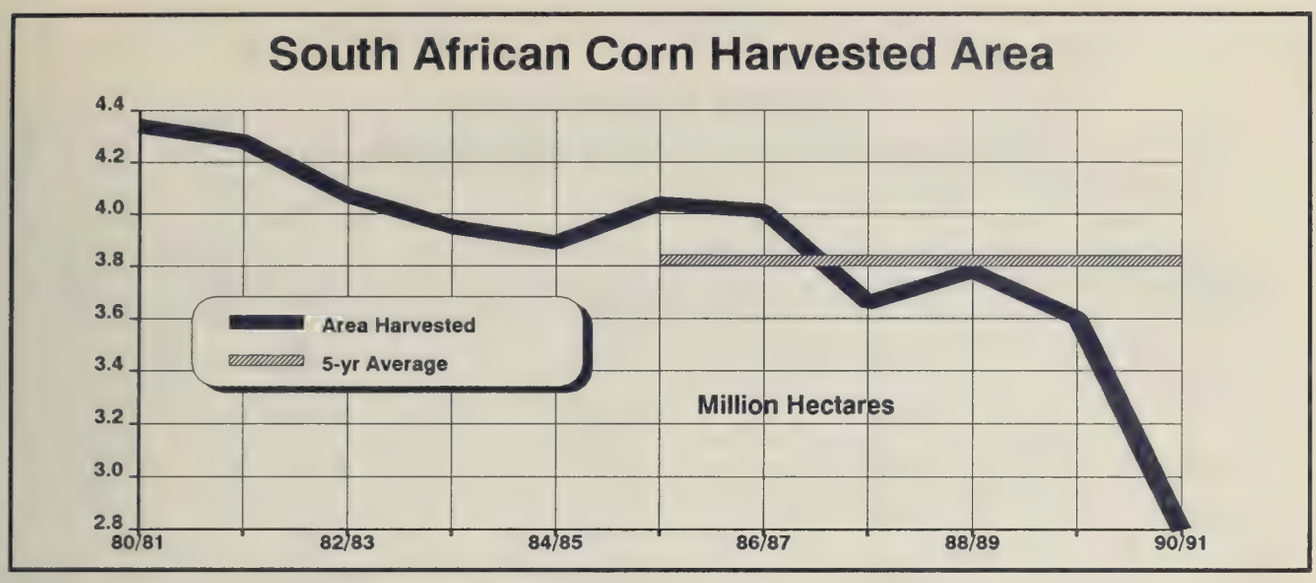
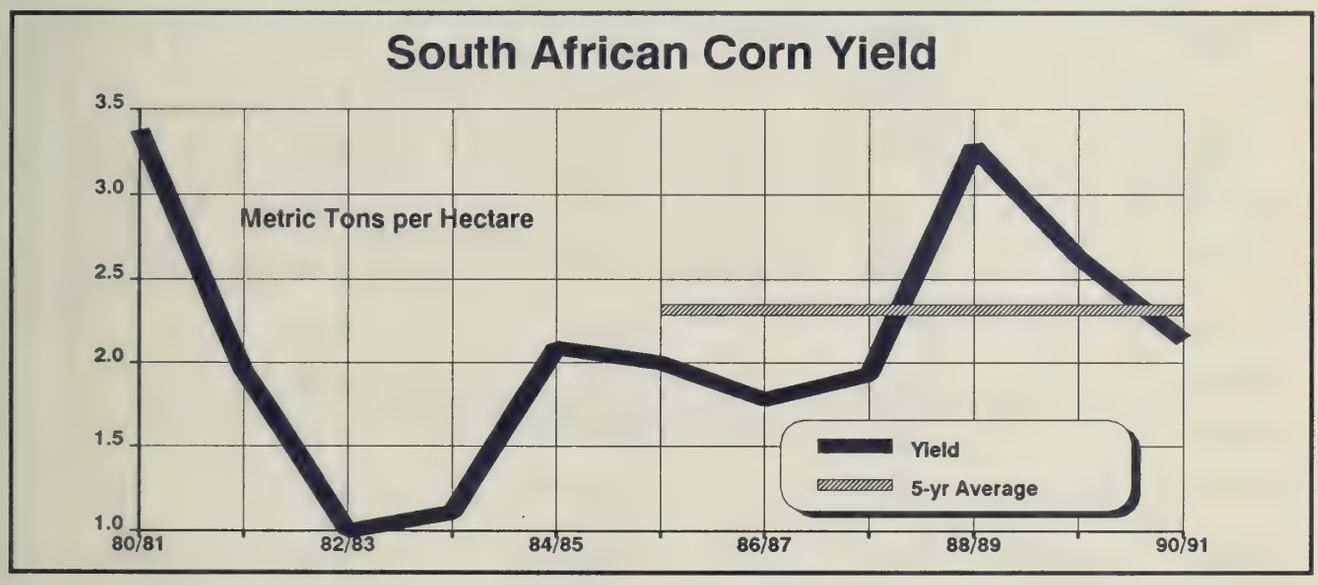


CHART 1


South African Corn Harvested Area
4.4
4.2
4.0
3.8
3.6
3.4
3.2
3.0
2.8
Area Harvested
5-yr Average
Million Hectares
80/81
82/83
84/85
86/87
88/89
90/91


South African Corn Yield
3.5
3.0
2.5
2.0
1.5
1.0
Metric Tons per Hectare
Yield
5-yr Average
80/81
82/83
84/85
86/87
88/89
90/91

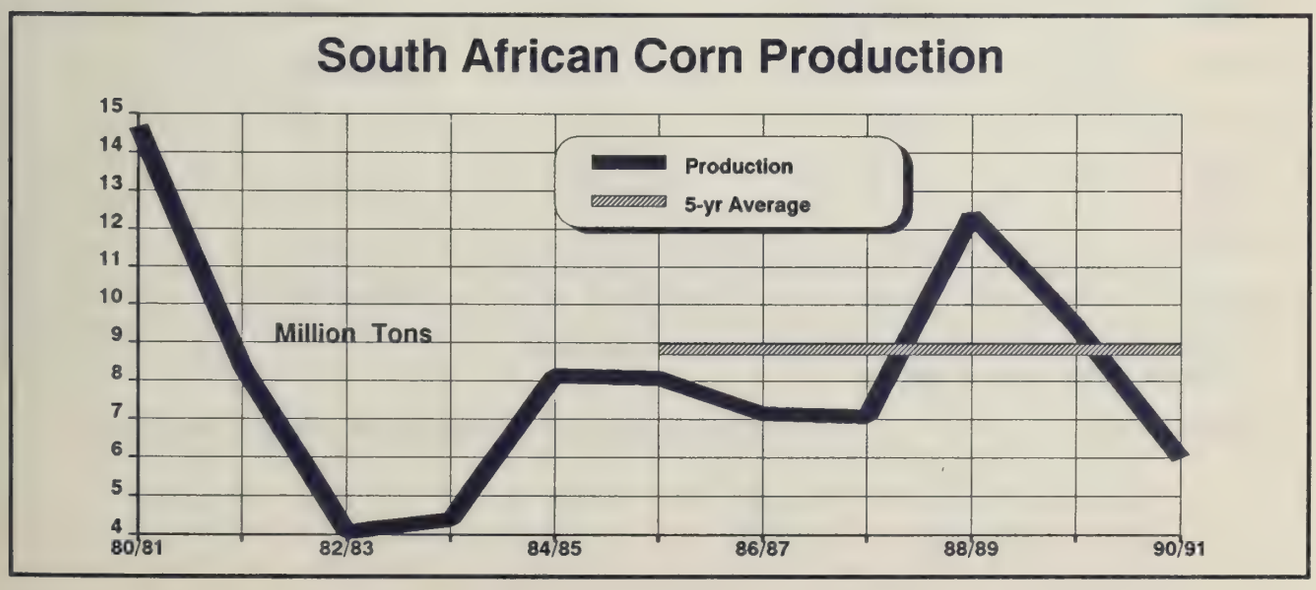

South African Corn Production
15
14
13
12
11
10
9
8
7
6
5
4
Production
5-yr Average
Million Tons
80/81
82/83
84/85
86/87
88/89
90/91

TABLE 9

South African Corn: Harvested Area, Yield, and Production

Year	Area	Yield	Production
70/71	4.40	1.95	8.60
71/72	4.58	2.07	9.48
72/73	3.61	1.15	4.16
73/74	4.46	2.49	11.11
74/75	4.49	2.04	9.14
75/76	4.55	1.61	7.31
76/77	4.45	2.18	9.73
77/78	4.50	2.24	10.06
78/79	4.31	1.94	8.33
79/80	4.32	2.49	10.76
80/81	4.34	3.38	14.66
81/82	4.28	1.95	8.36
82/83	4.07	1.00	4.08
83/84	3.95	1.11	4.41
84/85	3.89	2.09	8.14
85/86	4.04	2.00	8.08
86/87	4.01	1.78	7.15
87/88	3.66	1.93	7.08
88/89	3.78	3.28	12.38
89/90	3.60	2.62	9.44
90/91	2.80	2.14	6.00

*\ Area and Production in million's of hectares and metric tons.
Yield in metric tons per hectare.

February 1991 Production Estimates & Crop Assessment Division, FAS, USDA

DECIDUOUS FRUIT AND TABLE GRAPE SITUATION

World commercial apple production for the 1990/91 season is expected to total 21.2 million tons, down 2 percent from the year earlier level. Apple crops in the United States and Canada were hurt by unfavorable weather conditions during the pollination and bloom stages. Current estimates show EC output down 4 percent from 1989/90 and 1 percent from the October USDA estimates. Output in Germany and France, two of the larger producers, is above last year's level as bumper late season crops helped offset part of the early season losses from an April freeze. Production in Italy is estimated down about 7 percent from last year's revised figure. The preliminary estimate for Southern Hemisphere apple production is 3.1 million tons, up 2 percent from last year. Australia and Chile are estimated to show the largest volume increases. Australia is benefiting from an "on year" in the production cycle. Increased bearing area and the maturation of recent plantings are boosting Chilean production.

Commercial pear production at the world level is estimated at 5.2 million tons for 1990/91, almost unchanged from last year. North American output is up 4 percent because of a larger crop in the United States. Production in the EC is estimated down 2 percent as a sharp increase in Italy was more than offset by declines elsewhere. The large Italian crop resulted from favorable weather and an increase in harvested area. The northern EC countries were hurt by a spring freeze and excessively dry weather in many producing regions. Pear production in the Southern Hemisphere is expected to total 770,300 tons, about 1 percent above the 1989/90 level. Output in Chile is expected to increase 12 percent as area continues to increase and recently planted trees mature. However, forecast declines in Argentina and New Zealand nearly offset the increase in Chile.

SOUTHERN HEMISPHERE DECIDUOUS FRUIT AND TABLE GRAPE PRODUCTION 1/
(1,000 Metric Tons)

	1988/89	1989/90	1990/91 2/
Apples	2,911.2	3,041.1	3,116.0
Pears	715.6	761.5	770.3
Apricots	113.4	134.0	129.2
Cherries	17.6	18.4	19.8
Peaches/nectarines	649.6	656.9	628.0
Table grapes	781.8	889.1	985.0
TOTAL	5,189.2	5,501.0	5,648.3

1/ Apple and pear data are on a July/June production and marketing year. All other data are on a calendar year basis (1989, 1990, 1991).
2/ Preliminary.

Apricot production for 1991 in the Southern Hemisphere is now forecast at 129,200 tons, down 4 percent from 1990. Most of the downturn is expected to occur in South Africa, where output was up sharply in 1990. World 1990 apricot production is currently estimated at 1.2 million tons, down 5 percent from 1989, but up 2 percent from the October estimate. Upward revisions in the estimates for most Southern Hemisphere countries primarily accounted for the change since October.

The Southern Hemisphere's 1991 peach and nectarine crop is forecast at 628,000 tons, down 4 percent from 1990. Argentina's crop is forecast at 200,000 tons, down 20 percent, largely due to wind and hail damage early in the growing season. Australia, Chile, and South Africa are each forecast to show a modest production increase but not enough, in aggregate, to offset the Argentine decline. For 1990, world production is estimated at 6.24 million tons, up somewhat from the October estimate of 6.14 million tons. Better than expected harvests in the United States, Italy, and Chile accounted for most of the increase.

Early prospects for 1991 table grape production in the Southern Hemisphere are very favorable. Preliminary country forecasts aggregate to 985,000 tons, up 11 percent from 1990. Chilean production is forecast at 720,000 tons, up 90,000 tons. Area was up again in 1990 and maturing vineyards are pushing up the national average yield. An estimated 30 percent of Chile's vineyards are still not mature from the standpoint of maximum yields. World table grape production for 1990 is estimated at 4.6 million tons, 1 percent above 1989. Aggregate forecasts were not available in October, but among the individual countries, Italy's 1990 output is down 3 percent reflecting crop damage caused by a prolonged dry spell. Estimates for Argentina and Chile have been revised upward.

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TABLE 10

WORLD COMMERCIAL APPLE PRODUCTION
(1,000 Metric Tons)

	1988/89	1989/90	1990/91 1/
NORTHERN HEMISPHERE			
NORTH AMERICA			
Canada	500.7	536.7	490.0
Mexico	624.3	473.9	493.2
United States	4,140.4	4,519.0	4,320.4
Total	5,265.4	5,529.6	5,303.6
EUROPEAN COMMUNITY:			
Belgium/Luxembourg	271.6	322.4	259.9
Denmark	90.2	90.0	95.0
France	1,934.7	1,818.2	1,884.9
Germany, Fed. Rep.	2,467.0	1,726.5	1,797.6
Greece	269.1	264.3	296.0
Italy	2,442.5	2,162.0	2,000.0
Netherlands	383.0	417.0	431.0
Spain	844.8	757.0	614.4
United Kingdom	234.4	416.2	268.9
Total	8,937.3	7,973.6	7,647.7
OTHER EUROPE:			
Austria	295.7	255.1	254.3
Hungary	1,130.8	959.0	950.0
Norway	52.0	69.0	50.4
Sweden	90.0	100.8	70.0
Switzerland	435.5	217.9	293.3
Turkey	1,950.0	1,800.0	1,900.0
Yugoslavia	518.0	546.0	500.0
Total	4,472.0	3,947.8	4,018.0
TOTAL EUROPE	13,409.3	11,921.4	11,665.7
ASIA:			
Japan	1,042.0	1,045.0	1,069.0
Taiwan	12.1	18.0	12.8
Total	1,054.1	1,063.0	1,081.8
Total Northern Hemisphere	19,728.8	18,514.0	18,051.1
SOUTHERN HEMISPHERE			
Argentina	1,029.5	1,075.0	1,060.0
Australia	328.0	315.0	350.0
Chile	660.0	690.0	730.0
New Zealand	359.5	403.9	416.0
South Africa	534.2	557.2	560.0
Total Southern Hemisphere	2,911.2	3,041.1	3,116.0
WORLD PRODUCTION	22,640.0	21,555.1	21,167.1

1/ Preliminary.

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TABLE 11

WORLD COMMERCIAL PEAR PRODUCTION
(1,000 Metric Tons)

	1988/89	1989/90	1990/91 1/
NORTHERN HEMISPHERE			
NORTH AMERICA			
Canada	23.3	21.3	19.5
Mexico	50.1	44.9	43.7
United States	781.0	831.7	869.8
Total	854.4	897.9	933.0
EUROPEAN COMMUNITY:			
Belgium/Luxembourg	84.0	87.2	63.8
Denmark	6.0	5.8	6.6
France	315.1	326.9	318.3
Germany, Fed. Rep.	498.2	347.1	328.8
Greece	91.4	95.0	86.7
Italy	986.5	820.0	1,000.0
Netherlands	89.0	113.0	90.0
Spain	457.3	550.2	406.9
United Kingdom	31.7	43.6	36.8
Total	2,559.2	2,388.8	2,337.9
OTHER EUROPE:			
Austria	53.8	46.7	44.8
Norway	7.8	4.2	5.5
Sweden	11.3	10.8	10.4
Switzerland	23.5	17.9	18.0
Turkey	410.0	425.0	430.0
Yugoslavia	173.3	177.0	150.0
Total	679.7	681.6	658.7
Total Europe	3,238.9	3,070.4	2,996.6
ASIA:			
Japan	454.1	447.9	461.0
Total Northern Hemisphere	4,547.4	4,416.2	4,390.6
SOUTHERN HEMISPHERE			
Argentina	262.0	265.4	251.0
Australia	147.0	152.0	157.0
Chile	119.0	139.0	155.0
New Zealand	12.7	12.6	12.3
South Africa	174.9	192.5	195.0
Total Southern Hemisphere	715.6	761.5	770.3
WORLD PRODUCTION	5,263.0	5,177.7	5,160.9

1/ Preliminary.

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TABLE 12

WORLD COMMERCIAL APRICOT PRODUCTION
(1,000 Metric Tons)

	1988	1989	1990	1991 1/ 2/
NORTHERN HEMISPHERE				
France	96.2	128.0	105.0	N/A
Greece	153.9	83.9	113.4	N/A
Italy	195.8	189.0	181.5	N/A
Spain	157.4	155.6	120.7	N/A
Turkey	360.0	445.0	400.0	N/A
United States	92.2	108.9	111.1	N/A
Yugoslavia	28.0	46.0	40.0	N/A
Total	1,083.5	1,156.4	1,071.7	N/A
SOUTHERN HEMISPHERE				
Argentina	23.0	16.6	16.5	16.0
Australia	29.5	31.0	32.0	32.5
Chile	12.5	14.0	14.7	15.5
New Zealand	8.5	8.8	10.0	9.3
South Africa	44.2	43.0	60.8	55.9
Total	117.7	113.4	134.0	129.2
WORLD PRODUCTION	1,201.2	1,269.8	1,205.7	N/A

1/ Preliminary. 2/ N/A = not available until October 1991.

TABLE 13

WORLD COMMERCIAL CHERRY PRODUCTION
(1,000 Metric Tons)

	1988	1989	1990	1991 1/ 2/
NORTHERN HEMISPHERE				
Canada	12.3	13.5	13.0	N/A
France	77.4	99.0	74.0	N/A
Germany, Fed. Rep.	232.8	205.9	205.3	N/A
Greece	35.0	35.8	41.7	N/A
Italy	144.0	136.5	100.0	N/A
Japan	18.4	14.5	16.0	N/A
Spain	42.9	61.8	42.6	N/A
Turkey	215.0	210.0	200.0	N/A
United States	276.1	295.3	236.9	N/A
Yugoslavia	200.8	220.0	170.0	N/A
Total	1,254.7	1,292.3	1,099.5	N/A
SOUTHERN HEMISPHERE				
Australia	7.1	7.0	7.2	7.5
Chile	8.6	10.6	11.2	12.3
Total	15.7	17.6	18.4	19.8
WORLD PRODUCTION	1,270.4	1,309.9	1,117.9	N/A

1/ Preliminary. 2/ N/A = not available until October 1991.

TABLE 14

WORLD COMMERCIAL PEACH & NECTARINE PRODUCTION
(1,000 Metric Tons)

	1988	1989	1990	1991 1/ 2/
NORTHERN HEMISPHERE				
Canada	44.1	37.6	43.0	N/A
France	451.5	546.0	505.0	N/A
Greece	614.6	641.0	700.0	N/A
Italy	1,476.1	1,682.0	1,700.0	N/A
Japan	202.9	180.2	201.1	N/A
Mexico	264.5	265.0	265.0	N/A
Spain	649.4	769.8	602.6	N/A
Turkey	328.0	315.0	305.0	N/A
United States	1,367.2	1,240.5	1,191.7	N/A
Yugoslavia	77.0	80.0	65.0	N/A
Total	5,475.3	5,757.1	5,578.4	N/A
SOUTHERN HEMISPHERE				
Argentina	260.0	260.0	249.5	200.0
Australia	75.0	63.4	67.6	71.6
Chile	151.4	162.4	175.0	185.0
New Zealand	28.5	24.6	26.4	25.9
South Africa	145.7	139.2	138.4	145.5
Total	660.6	649.6	656.9	628.0
WORLD PRODUCTION	6,135.9	6,406.7	6,235.3	N/A

1/ Preliminary. 2/ N/A = not available until October 1991.

TABLE 15

WORLD COMMERCIAL TABLE GRAPE PRODUCTION
(1,000 Metric Tons)

	1988	1989	1990	1991 1/ 2/
NORTHERN HEMISPHERE				
France	128.6	125.0	125.0	N/A
Greece	318.9	269.8	275.0	N/A
Italy	1,427.4	1,490.0	1,350.0	N/A
Japan	259.5	235.2	254.8	N/A
Mexico	335.6	345.0	347.0	N/A
Spain	414.0	430.1	496.7	N/A
United States	754.2	714.2	695.8	N/A
Yugoslavia	173.3	153.3	172.5	N/A
Total	3,811.5	3,762.6	3,716.8	N/A
SOUTHERN HEMISPHERE				
Argentina	120.0	140.0	146.0	150.0
Chile	490.0	540.0	630.0	720.0
South Africa	87.0	101.8	113.1	115.0
Total	697.0	781.8	889.1	985.0
WORLD PRODUCTION	4,508.5	4,544.4	4,605.9	N/A

1/ Preliminary. 2/ N/A = not available until October 1991.

February 1991 Production Estimates and Crop Assessment Division

FOREIGN COTTON AREA INDICATIONS FOR 1991/92

Important factors that influence foreign cotton area include the current cotton market situation, domestic and world economic conditions, government policies, and weather. Of these factors, this season's higher cotton prices which are associated with low stock/use ratios are providing the biggest stimulus for influencing next season's cotton area.

Preliminary indications are that foreign harvested cotton area in 1991/92 could range from 28.5 to a record 30.5 million hectares. The high end of the forecast range suggests a possible increase from the estimated 29 million hectares harvested in 1990/91 and is supported by current higher cotton prices relative to last season and continued strong demand. The low end of the forecast range considers the possibility of weather-related losses and financial problems.

In China, as in the past, production increases are needed so that it can maintain its role as a major exporter of both raw cotton and textiles while meeting its rapidly rising domestic consumption requirements. The Government has indicated that the goal for the eighth 5 year-plan (1991-95) is to produce 21 to 23 million 480-pound bales per year. China is expected to continue its push to increase cotton production in 1991/92. China's 27-percent boost in the cotton procurement price and subsidization of cotton production inputs prompted larger plantings for 1990. While there are no signs of price increases for the 1991 season, maintenance of cotton prices at the 1990 level combined with depressed grain market prices should help ensure a slight expansion of area planted for 1991.

Cotton area in the Soviet Union for 1991/92 is affected by two opposing forces: the need to earn hard currency versus the need to provide more food production for the cotton producing region of Soviet Central Asian republics. The strongest argument for area expansion revolves around current relatively high world cotton prices and the pressure to earn hard currency by means of cotton exports. The pressure to reduce cotton plantings and increase the area dedicated to food and forage crop production comes from the Asian Republics. In addition to their food concerns, the republics have experienced an increase in land salinity from cotton irrigation. On balance, cotton area is expected to decline slightly next season as it has done for the the past 3 years.

In Mexico, indications are that, due to large farmer owned stocks of poor quality cotton, area planted to cotton is expected to be down from the 1990/91 level. However, the exact level will depend primarily on financing available to producers. Cotton producers have had 2 consecutive years of poor cotton crops, complete with high levels of pre- and post-harvest crop losses. This year, producers could find themselves in a financial crunch with their amount of private saving low and production loans hard to get. In most Central American countries, planting decisions remain uncertain. Political and labor unrest, foreign exchange needs, and input costs will largely determine cotton production levels in most of these countries.

South America cotton planting for 1991/92, which will begin in about 7 months, remain uncertain. If production financing prospects do not improve from the current season, plantings are likely to be down from 1990/91. Lower plantings are most probable in the three largest producing countries of Brazil, Argentina, and Paraguay. In Brazil, the largest of the three, sowing will be influenced directly by the level of rural credit availability, minimum support prices, and food crop prices at planting time.

In South Asia, cotton plantings should push moderately above last year. Although plantings in Pakistan will not begin until the April-May period, cotton area intentions for the 1991/92 season are being influenced by this year's higher cotton prices along with a continued strong domestic demand from the expanding textile industry. Area expansion is constrained by the lack of available land in the major cotton producing region. In India, area planted next season will be influenced by the outcome of the debate between textile mills and the Ministry of Agriculture over the amount of cotton to be exported out of the 1990/91 crop. A pro-export decision from the Indian Government is likely to push cotton prices up and encourage larger plantings. In Australia, sowing is expected to increase if higher cotton prices prevail when planting time nears in September-October and sufficient soil moisture is available to maintain this year's level of dryland seeding.

In Turkey, cotton sowing in May of this year is expected to be down from last season as farmers switch from cotton to other crops. This change is reflected in the shift in government policy not to include cotton in the Government's support program. Currently, domestic lint prices are lower than last year as imports of raw cotton, cotton yarn, and fabric at competitive prices have depressed domestic prices. This has forced the agricultural marketing cooperatives, which had purchased cotton from member farmers at approved government prices, to miss timely payments to cotton farmers. This condition is expected to continue into next season. The planting of cotton takes place following the harvest of wheat in the early spring. Since cotton is excluded from Government support and production costs are higher for cotton compared with other crops, the planting of soybeans and/or corn after the wheat harvest is drawing farmers away from cotton in the Adana, and to a lesser extent, in the Aegean regions. Syria plans to increase the area planted to cotton. The area actually sown will depend upon the severity of the current drought and its impact on the availability of irrigation water. If the rainfall continues to be below average, irrigation for cotton and other summer crops will be limited.

A moderate increase is forecast for cotton planting in Africa. Many of these countries depend very heavily on cotton exports for sorely needed foreign exchange earnings. Because of this need, there is strong support for the cotton sector. In West Africa, this is particularly true for Cote d'Ivoire, Mali, Benin, Cameroon, and Burkina. The Egyptian Government would like to expand cotton area. However, the major constraint to production continues to be the lack of incentive due to the low procurement price. Thus far the Ministry of Agriculture and Land Reclamation and other concerned Ministries do not appear inclined to liberalize controls on cotton production or marketing or to increase the procurement price next season. In Sudan, it appears that area will increase to provide much needed foreign exchange from cotton exports. The cotton area in Zimbabwe also is anticipated to increase as the Government has raised producer prices to encourage farmers to plant more cotton. South African area is expected to rebound from the 1990 drought reduced area.

Cotton area in the European Community (EC) is likely be slightly below last year's level as alternative crops, such as corn, are currently at very attractive price levels. However, planting decisions are especially difficult to forecast at this time since the EC is delaying the 1991/92 price package as they reform the Common Agricultural Policy. Greece, the largest EC producer, is expected to shift at least 10 percent of its area to corn.

NOTE: Information in this article is based on field reports received in early January 1991 from U.S. agricultural counselors and attaches. Actual area could vary from these estimates for a number of reasons, including government policy changes, weather during the crop season, and price changes for cotton and competing crops. The first official USDA forecast of total 1991/92 foreign harvested area will be issued in May. Individual country estimates for area, yield, and production will be released in July.

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CHART 2

1991/92 Forecast of Foreign Cotton Area

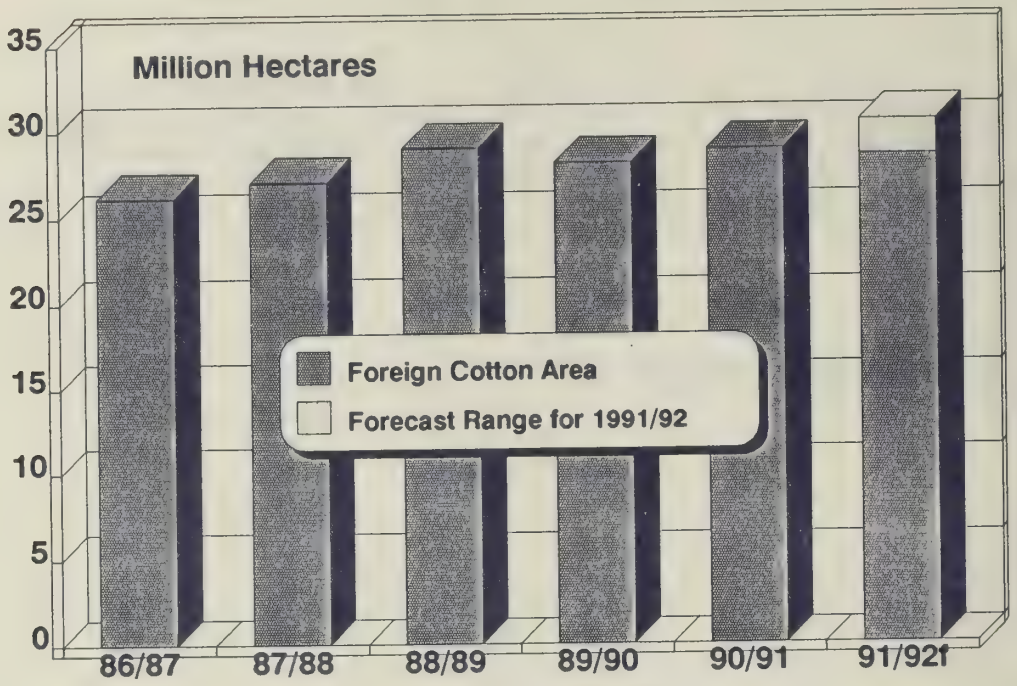

TABLE 16

FOREIGN COTTON AREA, YIELD, AND PRODUCTION			
Year	Harvested Area (1,000 Ha)	Yield (Kg/Ha)	Production (1,000 480-Bales)
1981/82	27,415	441	55,542
1982/83	27,499	446	56,289
1983/84	27,938	454	58,232
1984/85	29,752	556	76,034
1985/86	27,606	531	67,326
1986/87	26,158	509	61,087
1987/88	27,058	535	66,483
1988/89	28,961	521	69,254
1989/90	28,117	525	67,808
Estimate 1990/91	28,867	531	70,442
5-Year Avg.	27,580	524	66,392
Forecast 1991/92	(28,500 to 30,500)		

DAIRYING IN GERMANY

Reunification of East and West Germany became a fact on Oct. 3rd 1990, but even before that the reunification process was having an important impact on the agricultural sector and on dairying in particular. Available information indicates dairying, particularly in the eastern region (the former East Germany), has been impacted significantly. This article presents some of the characteristics of the dairy sector in both regions of Germany and discusses some of the adjustments that are being made in the dairy sector in eastern Germany as it integrates with western Germany (the former West Germany) and the European Community (EC).

A comparison of the structure of dairying in the two regions gives some indication of the potential problems. Dairying in western Germany is characterized by many small to moderately sized operations. Statistics for 1987 indicated that it had 330,000 dairy herds with an average size of 16 cows. This is the lowest average in the northern EC countries. France, with the next lowest average, reported a 20 head average while neighboring Belgium and The Netherlands had averages of 24 and 40 head, respectively. Half the national herd is reported to be held by farms milking 20 to 50 cows. German Fresian, a dual purpose breed, is the most popular, accounting for about half the herd. Simmental, also dual purpose, accounts for one-fourth the herd.

In contrast to the relatively small units in western Germany, milk production in eastern Germany is characterized by a small number of large units. Prior to reunification, the national average was reported to be above 500 milk cows per farm with some units as large as 2,000 cows. The dual purpose, black and white breed (Fresian) predominates. During the past decade, East German planners thought that more beef rather than more milk was needed with the result that beef production was emphasized. A result of that emphasis has probably been a reduction in the genetic potential of the herd to produce milk.

Despite the large differences in the structure of milk production, differences in the milk processing industry are probably of even more importance. The milk processing industry of western Germany is generally in the hands of producer owned cooperatives and is modern and up to date in terms of both product quality and variety of products and packaging. The state owned processing sector in the former East Germany, while producing a safe product health wise, generally had not kept up with modern methods, with the result that quality, variety, and packaging are not up to international standards. Thus as soon as trade within the country was freed, consumers in the eastern regions tended to strongly favor products from western Germany.

Differences in the size and productivity of the two regions are shown in the following table.

TABLE 17

SELECTED DAIRY PRODUCTION DATA FOR EASTERN AND WESTERN GERMANY 1/

	1986	1987	1988	1989	1990
Total Cattle (Mil. head)					
Eastern Germany	5.8	5.8	5.7	5.7	5.7
Western Germany	15.6	15.3	14.9	14.7	14.6
Combined	21.4	21.1	20.6	20.4	20.3
Milk Cows (Thou. head)					
Eastern Germany	2064	2045	2012	2010	2001
Western Germany	5437	5277	5059	4950	4800
Combined	7501	7322	7071	6960	6801
Milk Prod. (Mil. Ton)					
Eastern Germany	7.9	8.2	8.1	8.2	7.8
Western Germany	26.4	24.4	24.0	24.2	23.6
Combined	34.3	32.6	32.1	32.4	31.4
Milk/Cow (Tons)					
Eastern Germany	3.82	4.01	4.03	4.08	3.92
Western Germany	4.86	4.62	4.74	4.89	4.92
Combined	4.57	4.45	4.54	4.66	4.62
Butter (1000 tons)					
Eastern Germany	320	322	310	313	305
Western Germany	567	464	390	378	381
Combined	887	786	700	691	686
Cheese (1000 tons)					
Eastern Germany	253	264	264	275	205
Western Germany	530	553	585	610	630
Combined	783	817	849	885	880
Nonfat Dry Milk (1000 tons)					
Eastern Germany	50	52	48	50	50
Western Germany	647	474	398	450	420
Combined	697	526	446	500	470

1/ The former countries of East Germany and West Germany respectively.

With its reunification with western Germany, the dairy industry in eastern Germany also became subject to EC rules and benefits. Some of the changes that will bring include changes in the number of cows being milked, feed usage, milk production and utilization, prices, and the structure of the processing industry.

MILK

Under the Common Agricultural Policy of the EC (CAP), milk deliveries to dairies in eastern Germany must fall by at least 20 percent, from the 7.8 million tons bought by the state in 1989 to 6.3 million tons in 1991/92. The temporary quota for eastern Germany was set at 5.37 million tons for the period July 1, 1990 to March 31, 1991. As private farmers break away from the collective farms, they are given a part of the quota from their parent farm. Farmers are adjusting dairy herds in response to the signals of the market. Official statistics show that the number of milk cows declined from a high of 2.0 million in 1988, to 1.9 million by August 1, 1990. During 1990, many dairy cows were sold for slaughter and the meat exported, in large part to the USSR and other EC countries.

Along with declining cow numbers in eastern Germany, feeding regimes are changing as well. In the past, mixed feeds were formulated from whatever grains and feedstuffs were available as long as they met minimum standards. Now, farmers can freely purchase feeds to maximize output, so the productivity per cow is increasing.

In contrast to the problems of most of the dairy sector in eastern Germany, reunification has permitted the reconstruction of natural trade ties between the city of Berlin and the surrounding countryside for the supply of milk. The city dairy of West Berlin, which in the past trucked milk to Berlin from as far away as Bavaria, plans to buy most of its raw milk from local (eastern region) farmers.

The average price paid to East German farmers for milk in 1989 was 1,700 East German marks per ton. The current guaranteed producer price for raw milk is DM628 per ton. Under the CAP, farmers are guaranteed a minimum price for milk up to the farm quota level, so the efficient milk producers in the East should be able to prosper. However, despite the price protection offered by the CAP, many farms are facing an uncertain financial and legal future as the region tries to adjust to market relationships.

DAIRY PROCESSING

The major problems facing the milk industry stem from an outdated and under-capitalized processing industry and, as a result, the milk processing sector of Eastern Germany is undergoing a major restructuring. Of 155 milk processing plants in operation at the end of 1989, only 118 were operating in late 1990, and some trade sources were forecasting that only half of those plants would survive. Of the 155 facilities, 76 belonged to cooperatives, 59 were state factories and 20 were small private processors. Many factories, including half of the cheese facilities, closed because farmers sold their milk to processors in western Germany that could pay an acceptable cash price upon delivery. Meanwhile, processors in eastern Germany faced severe cash flow problems because the generous subsidies of the previous regime were abolished in July 1990.

BUTTER

The former East Germany produced two grades of butter. The lower grade, used for domestic consumption, contained 70 percent fat and accounted for 18 percent of production. The other grade, with 82 percent fat content, was exported where possible, or sold domestically. In 1990, almost all of the butter produced in eastern Germany was of the higher fat content. The quality of the butter produced in eastern Germany differs somewhat from the EC norms.

The policy of the previous regime was to maximize butter production in order to sell it on the world market for hard currency. Butter production reached 313,000 tons in 1989 and has continued strong in 1990. Strong performance occurred in 1990 despite the introduction of the free market system and the loss of domestic consumption because it was supported by an intervention buying system introduced on July 16, 1990.

The continued high production of butter in 1990 is not due to buoyant consumer demand but to intervention buying. Some officials estimate that, since July 1, 1990, only one-third of the butter produced in eastern Germany was consumed there. Total butter consumption has fallen sharply due to declining consumption of bread and the availability of many tasteful low-priced margarine products and vegetable oils for cooking.

CHEESE

Increased cheese production was another of the priorities of the previous regime. Cheese production in the former East Germany had increased 30 percent during the last 5 years of the 1980's. However, the long awaited investment program for the cheese processing industry did not materialize, and as a result, the cheese sector met the market economy with outdated equipment and a poor market image. In 1989, hard cheese accounted for half of total cheese production, soft cheese for 15 percent, and the rest was a variety of fresh cheeses. The sharp reduction in cheese production was comparable for all types.

East German citizens previously consumed record amounts of cheese, due to ample availability, a relatively wide range of fairly consistent products, and subsidized prices. In 1988, per capita consumption of all cheeses was 15.8 kilograms compared to 9.7 in western Germany. This consumption pattern was broken with the introduction of a vast array of new foods which became available in eastern Germany in 1990. By April consumers had more choice of vegetables, fruits, and sausages than before. With the currency union on July 1, 1990, cheese products from western Germany tended to dominate the market as consumer demand for products from eastern Germany declined and as many eastern Germany based wholesale networks were replaced by western wholesalers who brought in western products.

NONFAT-DRY MILK (NDM)

Dry milk is produced by 2 methods in eastern Germany. Roughly half the total output is produced by 13 plants using the spray-dry method while the other half is produced by 24 plants using the roll-dry method. The average composition of NDM is reported to be 1.5 percent or less butterfat and 94 percent dry matter.

Preliminary information indicated output of NDM has been less affected by reunification than other dairy products largely due to price support by the intervention system. The Government of East Germany, in coordination with and funded by the Government of West Germany, initiated an intervention program for NDM produced in eastern Germany in mid-July. This intervention system for eastern Germany ended on September 30 when the EC system was applied. The intervention price for NDM in eastern Germany is over DM6,400 per ton. Even at this price, some plants claim losses of up to DM1,000 per ton because their cost of production is too high due to out-of-date technology.

SUMMARY

During the next 2 or 3 years, the diary sector in the former East Germany is expected to continue to go through major restructuring as it attempts to harmonize with EC rules and markets. This restructuring will continue to put major financial pressure on inefficient producers and processors. After the restructuring is complete it is likely that with its larger herds, milk production in eastern Germany will have some economic advantages over production in the western region.

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EC-12 RAPESEED PLANTING INTENTIONS

The European Community (EC-12) rapeseed area is estimated to increase 7 percent from an estimated 1.97 million hectares to a record estimated 2.11 million hectares (excluding eastern Germany) in 1991/92. The unification of eastern and western Germany will boost that country's rapeseed area to 40 percent of total EC-12 area. France will drop to second place with 29 percent of the total. Although most of the rapeseed has already been planted, the oilseed scheme is expected to change as the European Commission is currently reforming their Common Agricultural Policy. The following is an unofficial USDA country by country estimate of planted rapeseed area for 1991/92 obtained from U.S. agricultural counsleors and attaches stationed in western Europe.

GERMANY: Rapeseed area for a united Germany is forecast to increase 30 percent to 940,000 hectares in 1991/92. Similar to last year, this winter has been mild. Due to improved winter-hardy varieties very little winter kill is expected. The former West Germany is expected to plant 677,000 hectares in winter rapeseed and 13,000 hectares in spring, while the former East Germany is expected to plant 236,000 hectares in winter rapeseed and 14,000 hectares in spring. In the West, farmers have shifted almost completely to double low varieties. The situation in the East is less certain, but reports indicate that most farmers purchased double low varieties.

FRANCE: Rapeseed area is forecast unchanged at 680,000 hectares in 1991/92 due to less favorable rapeseed prices compared to grain returns. The winter rapeseed crop, which accounts for nearly all the rapeseed, was sown with little delay and is benefiting from the average winter conditions.

UNITED KINGDOM: Rapeseed area is forecast to increase 5 percent to 410,000 hectares in 1991/92. The winter rapeseed crop condition is variable this year. New crop rapeseed has emerged well in light soils, but uneven on heavy soils, such as in East Angelia. Nearly all the area is reportedly sown in double low varieties.

DENMARK: Rapeseed area is forecast to increase marginally to 270,000 hectares in 1991/92. Winter rapeseed sowing is reported at 215,000 hectares, up 37 percent from last year due to Danish legislation requiring 65 percent of the arable land covered with growth during the winter to absorb nitrate washout. A mild winter, coupled with hardy winter rapeseed varieties will improve yield prospects for 1991/92.

SPAIN: Rapeseed area is forecast to increase to 30,000 hectares, up from 25,000 hectares last year. Spanish farmers are continuing the trend to plant more rapeseed as an alternative crop.

ITALY: Rapeseed area is forecast unchanged at 13,000 hectares. After 2 years of drier than normal weather in central Italy, conditions this winter have improved potential yield prospects.

THE NETHERLANDS AND BELGIUM-LUXEMBOURG: Rapeseed area in the Netherlands is forecast unchanged at 7,000 hectares. The Government is a major producer of rapeseed as they plant the crop on reclaimed land before turning the land over to the farmer. Belgium-Luxembourg is forecast to increase rapeseed area significantly during 1991/92, climbing to 8,000 hectares from 5,000 hectares last year. The farmers view rapeseed as a profitable crop for 1991/92.

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TABLE 18

EC-12 Rapeseed Area, Yield, and Production

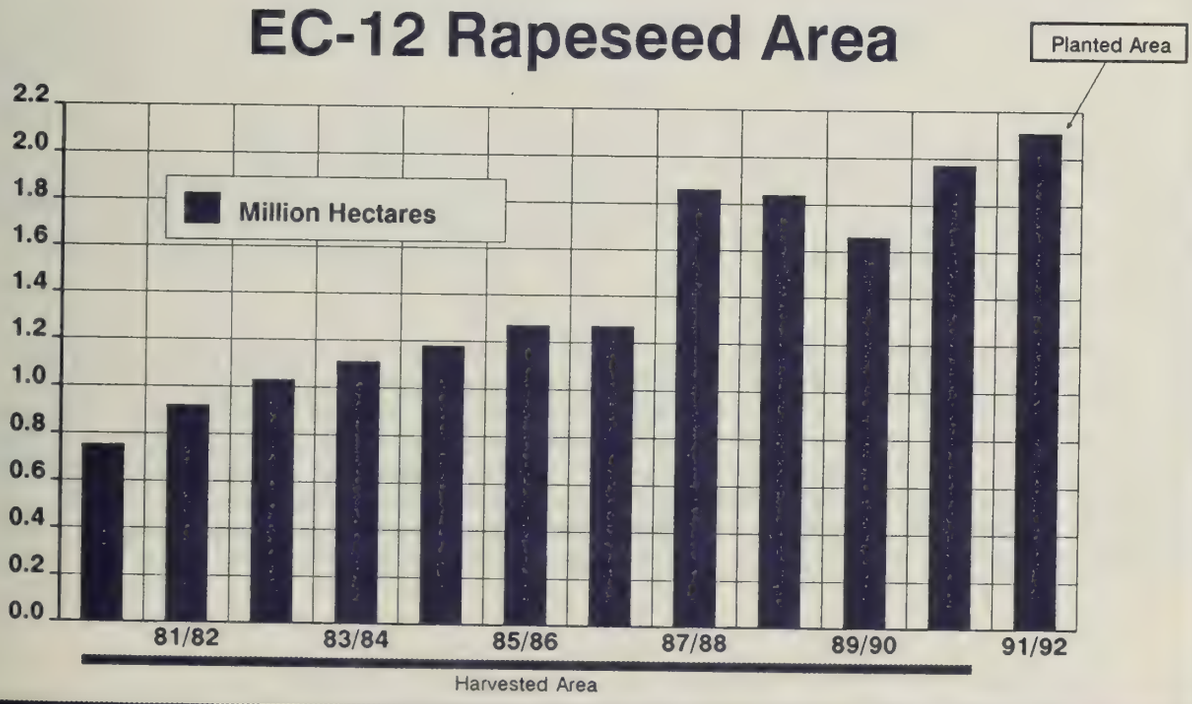
Year	Harvested Area	Yield	Production
	(1,000/Ha)	(MT/Ha)	(1,000/MT)
1980/81	753	2.72	2,050
1981/82	920	2.20	2,024
1982/83	1,029	2.58	2,659
1983/84	1,117	2.19	2,448
1984/85	1,178	2.92	3,439
1985/86	1,271	2.87	3,648
1986/87	1,270	2.91	3,696
1987/88	1,861	3.20	5,952
1988/89	1,840	2.81	5,170
1989/90	1,662	2.96	4,924
1990/91	1,963	2.92	5,723
5-Year Avg.	1,719	2.96	5,093
Planted 1991/92	2,110		

*/ Does not include eastern Germany.

CHART 3

Area Harvested VS. Planted For 1991/92

Below is a comparison of harvested rapeseed area with the initial forecast of planted area for 1991/92. Planted area is an unofficial USDA estimate provided by U.S. agricultural attaches stationed in EC countries. This data excludes eastern Germany--estimated at 250,000 hectares for 1991/92. Official USDA harvested area and production estimates will be published in July 1991.



SENEGALESE AGRICULTURAL PRODUCTION

AGRICULTURAL OVERVIEW

The Government of Senegal has historically performed a major role in regulating the agricultural sector. During the mid-1980's however, the Government launched a new agricultural policy as part of an economic reform package aimed at reducing the role of the Government in the agricultural and commercial sectors. The policy intended to increase productivity and reduce government intervention by eliminating input subsidy and credit programs, removing support prices on coarse grains, and liberalizing domestic grain markets. The Government retained its role in extension and research services, holding seed stocks, and regulating the market for oilseeds. As part of a current banking reform movement the Government has also reduced its ownership in any bank to 25 percent. This initiative has forced many banks to close or be restructured. As a result, banks were reluctant to extend credit to farmers during this transition period, leaving farmers without adequate funds for the 1990/91 planting season.

The reduced availability of credit for the purchase of inputs coupled with the progressive reduction of input subsidies, have limited fertilizer use during the 1990/91 season. Most inputs are purchased for use on cash crops such as peanuts and cotton, although some fertilizers and pesticides are used on irrigated rice and corn. While grain production is primarily for local consumption needs, oilseeds are produced to generate export earnings, leaving the oilseed sector more vulnerable to changes in government price controls, input subsidy reductions, and credit limitations.

Agricultural activity is localized in two distinct growing regions, The Peanut Basin in the south and the Senegal River Basin along the northern border of the country. The major agricultural region, the Peanut Basin, lies within the Sahelian zone of West Africa and can be characterized as having a tropical climate with a long dry season. Oilseed and grain production are primarily rain-fed, and productivity is dependent on the length, timing, and intensity of the rainy season, which extends from May until October. Peanut and millet are the predominant crops grown in the Peanut Basin. Farmers in this region currently face a growing problem with soil nutrient depletion. Local farmers use virtually all peanut and millet vegetative material as fuel and feed, incorporating a negligible amount of organic matter back into the soil. This problem has been compounded in recent years by the decline in fertilizer use as input subsidies and purchase prices are phased out. Irrigated rice and corn are grown in the Senegal River Basin, which falls within the Sahelian or sub-desert region.

The 1990/91 rainy season began late, with inadequate and poorly distributed rainfall for all major growing regions. Cumulative rainfall totals in the Peanut Basin ranged from approximately 20 to 70 percent of the 30-year average. The uneven temporal and spatial rainfall distribution was most damaging to crop development, although the southern Peanut Basin, which is the major cotton producing region, was less affected. Crop production in the Senegal River Basin was affected by the lack of adequate precipitation and was further retarded by crop diseases and insect infestations.

COARSE GRAINS

Coarse grains, including millet, sorghum, and corn, are grown for local consumption in the rural areas. Only a small percentage of coarse grain production enters the commercial sector and is sold to urban markets. Land preparation, tillage, and cultivation are performed primarily by hand or with the assistance of draft animals. Planting begins with the onset of the rainy season in May and continues until July. The late arrival of the 1990/91 rainy season resulted in late plantings and poor early crop establishment. Harvesting occurs from September through November. Senegalese farmers planted 1.111 MHa of coarse grains in 1990/91, a 7 percent decrease from the 1.197 MHa planted last year. The area decline, compounded by weather-induced yield reductions resulted in a 10 percent decline in 1990/91 coarse grain production.

Millet is Senegal's most widely produced grain crop. In 1990/91 Senegal produced an estimated 567,000 tons, down 13 percent from the 650,000 tons produced in 1989/90. The decreased production was due both to an area shift to peanuts and to dry weather. All production is rain-fed with the exception of approximately 6,000 irrigated hectares in the Senegal River Basin. Sixty percent of the crop is produced in the Peanut Basin, where millet competes with peanut for area. However, millet is not a competing source of cash income since it is grown as a staple food for home consumption. Fertilizers and pesticides are generally not applied to millet, although some application of NPK 14-7-7 may occur. This year purchases of this fertilizer were limited due to the elimination of government input subsidies.

Sorghum production, which is centered in the primary peanut and millet growing regions, was also negatively impacted by the poor weather. Seventy percent of Senegal's corn crop is produced in the southeastern Peanut Basin near Kolda and Tambacounda. Production is typically located near villages, where the farmers can easily utilize manure and village waste as fertilizer. Corn is usually the first crop planted in the south, with planting under way in May and harvest beginning in August. In the southern-most areas farmers have recently begun planting corn instead of millet, due to corn's greater resistance to parasitic diseases. Corn production is primarily rain-fed, with approximately 500 hectares of irrigated corn grown along the northern Senegal River.

RICE

Rice is planted from August to mid-September and is grown in two distinct regions. The northern rice production areas in the Senegal River Basin account for 55 percent of total production. Farmers in the southern Casamance region produce 40 percent of Senegal's rice crop. All production in the Senegal River Basin is irrigated, whereas production in Casamance is rainfed. Fertilizer use is limited to areas of high rainfall or irrigation. Irrigated rice production costs are high due to expensive irrigation supplies and land development costs - associated with the expansion of irrigated area and the completion of the Manatali and Diama dams. Due to credit limitations at the outset of the 1990/91 season, farmers in the Senegal River Basin lacked the funds needed to purchase irrigation equipment. Producer inability to obtain credit for input purchases and equipment resulted in yield reductions. Recent civil unrest in the Casamance region disrupted production operations as the conflict intensified. The irregular 1990/91 rainy season also contributed to yield reductions.

OILSEEDS

Oilseeds are cash crop alternatives to the basic food crops, such as rice, millet, sorghum, and corn. Peanuts and cottonseed are the two predominant oilseeds produced in Senegal. Government oilseed policy is primarily aimed at supporting farm income. A secondary objective is to encourage foreign exchange earnings. These objectives are achieved through the implementation of guaranteed producer prices and the underwriting of the crushing industry. Subsidizing of cottonseed and peanut export products, combined with the taxing of imports, serves as a means of combating the country's reportedly overvalued currency.

Senegal is Africa's largest peanut producing country. The most important oilseed crop is peanuts, and they have been an important cash crop since the mid-1800's. Oilstock peanuts are the most widely produced. The export of peanut meal and oil is a major foreign exchange earner for Senegal. Smuggling of peanuts from The Gambia into Senegal is widespread; Gambian farmers can move their crop across the border and sell the peanuts for a greater profit, due to the higher peanut support price paid in Senegal. Last year farmers produced an estimated 0.815 MMT of peanuts from 0.784 MHa, leaving farmers with a substantial carry over of personal seed stocks. Significant area diversions from millet to peanuts occurred due to the abundance of seed. However, this area increase was more than offset by the weather-induced yield reductions.

Cottonseed is produced as a by-product of the cotton fiber industry. Area planted to cotton reached a peak in 1984/85 at 46,000 hectares with production at 87,000 480-pound-bales, then began to decline as farmers responded to the lack of incentives for cotton production. The gradual elimination of subsidies on farm inputs has made production of cotton, which requires intensive use of inputs, less attractive to farmers. Area planted to cotton fell to a record low level of 24,000 hectares last year. Cotton area increased 50 percent to an estimated 36,000 hectares in 1990/91, as producers returned to cotton and planted less food crops such as millet and cowpeas. The inadequate and poorly distributed rainfall during the 1990/91 growing season also affected cotton yields. However, the primary cotton growing region in Casamance is located in the southern Peanut Basin, where rainfall was somewhat more favorable than in other regions. Cotton yields were therefore not reduced as dramatically as peanut yields. Cotton production in 1990/91 is expected to be about 55,000 480-pound-bales. There is growing concern that the reductions in subsidies on farm inputs may seriously impact future productivity of the cotton sector. Traditionally, cotton has been a relatively profitable crop, however, the high production costs associated with cotton make it sensitive to credit limitations and input costs.

Brenda Pressnall (202) 475-5139

TABLE 19

Senegal Grains and Oilseeds

	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	Estimate 1990/91	Average 1986-90
AREA HARVESTED	(1,000 hectares)											
Corn	78	57	86	71	83	111	95	99	110	112	114	105
Millet	1,115	850	991	784	1,002	1,335	856	946	893	953	864	996
Sorghum	--	--	--	--	--	--	--	128	130	132	133	78
COARSE GRAINS	*1,193*	*907*	*1,077*	*855*	*1,085*	*1,446*	*951*	*1,173*	*1,133*	*1,197*	*1,111*	*1,180*
Rice, Milled	67	69	68	52	66	71	72	74	81	80	79	75
GRAINS	*1,260*	*976*	*1,145*	*907*	*1,151*	*1,517*	*1,023*	*1,247*	*1,214*	*1,277*	*1,190*	*1,255*
Cottonseed	30	39	36	33	46	38	25	29	39	24	36	31
Peanut	1,064	1,080	1,121	937	874	607	808	846	903	784	915	789
TOTAL OILSEEDS	*1,094*	*1,119*	*1,157*	*970*	*920*	*645*	*833*	*875*	*942*	*808*	*951*	*820*
YIELDS	(metric tons per hectare)											
Corn	0.73	1.19	0.95	0.86	1.19	1.32	1.14	1.15	1.12	1.17	1.11	1.18
Millet	0.50	0.87	0.59	0.45	0.47	0.71	0.59	0.73	0.54	0.68	0.66	0.66
Sorghum	--	--	--	--	--	--	--	0.87	0.85	0.98	0.95	0.90
Rice, Milled	0.97	1.74	1.54	2.10	2.05	2.06	2.06	1.82	1.80	2.21	2.05	2.00
Cottonseed	0.50	0.64	0.92	0.58	0.83	0.42	0.60	0.69	0.64	0.75	0.61	0.58
Peanut	0.49	0.81	0.99	0.61	0.64	0.97	1.01	1.10	0.76	1.04	0.73	0.97
PRODUCTION	(1,000 metric tons)											
Corn	57	68	82	61	99	147	108	114	123	131	127	124
Millet	553	736	585	352	471	950	502	690	485	650	567	655
Sorghum	--	--	--	--	--	--	--	111	110	130	126	70
COARSE GRAINS	*610*	*804*	*667*	*413*	*570*	*1,097*	*610*	*915*	*718*	*911*	*820*	*850*
Rice, Milled	65	120	105	109	135	146	148	135	146	177	162	150
GRAINS	*675*	*924*	*772*	*522*	*705*	*1,243*	*758*	*1,050*	*864*	*1,088*	*982*	*1,000*
Cottonseed	15	25	33	19	38	16	15	20	25	18	22	18
Peanut	521	878	1,109	568	560	587	817	932	690	815	670	768
Palm Kernel	5	5	5	5	5	5	6	6	6	6	6	5
TOTAL OILSEEDS	*541*	*908*	*1,147*	*592*	*603*	*608*	*838*	*958*	*721*	*839*	*698*	*791*

February 1991

Production Estimates & Crop Assessment Division, FAS, USDA

INDONESIAN OILSEEDS

Total Indonesian oilseed production is expected to reach a record 3.94 million tons during 1990/91, the fourth record crop in as many years. This figure includes copra, soybeans, peanuts, and cottonseed. The USDA total oilseed figure does not include tropical oils production, such as palm oil, choosing instead to publish palm oil as a separate category. Palm oil accounts for the bulk of domestic production, estimated at a record 2.35 million tons for 1990/91.

COPRA

Copra rivals soybeans in volume of production, estimated at 1.25 million tons. But unlike soybeans, copra output has remained stable over the last 10 years, while soybean production nearly doubled. Copra is grown throughout Indonesia, 97 percent by small private producers. The island of Celebes (also known as Sulawesi) accounts for 25 percent of total output, followed by Sumatra, Java, and Ambon. The use of coconut for domestic consumption and home-crush for oil is widespread. Copra that enters the commercial market is influenced by the excess above domestic utilization and the price of copra--which is sensitive to the copra situation in the neighboring Philippines. Area planted to coconut trees has remained stable, with trees being replanted due to age and low productivity. The U.S. agricultural attache stationed in Jakarata reports that an estimated 30 percent of the coconut trees on North Celebes require replacement. Most coconut trees are the low yielding variety (characteristic of tall trees). It is estimated that more than 50 percent of all trees are over 10 years old with many of these over 50 years old. Re-plantings are proceeding at a slow pace however, as government credit has been in short supply, leaving most producers dependent on World Bank funds through the Smallholders Coconut Development Program.

SOYBEANS

Soybean production in 1990/91 is estimated at 1.20 million tons, up 0.1 million from last year, and equal to the record set during 1988/89. Although average yield was slightly below the 5-year trend, record harvested area bolstered output. Soybeans are grown mainly in the East and Central regions of the island of Java (accounting for approximately 57 percent). The remainder is grown on Sumatra (about 24 percent) and more recently on the island of Celebes (5 percent). Many soybeans are double cropped, with the first harvest during February through April and the second harvest lasting from July through August. Competitive crops are mainly rice and corn. Rice is the most important crop due to the Government's long-standing rice support program--including input price supports, extension services, and government credit--to attain self-sufficiency. This is particularly true in the central Java region, where both soybeans and rice are significant crops. Recent reductions in government input supports for rice and soybeans--which are not expected to effect soybeans due to the low use of fertilizers by producers--and real rice prices below last year, favors soybeans over rice for some producers. The Government has targeted soybean area expansion to increase by 300,000 hectares (equivalent to an estimated 295,000 tons) over the next few years, but this level may have little chance of success without additional incentives. At present, the major government incentive for soybeans is the protection of the domestic price which is often 30 to 50 percent above the world market price. BULOG, the Indonesian National Food Agency, effectively supports the domestic price by restricting imports of soybeans and soybean meal through import licensing.

PEANUTS

Indonesia is the world's fourth largest peanut producer, but only comprises 4 percent of the world's total output. With harvested area estimated at 620,000 hectares and adequate rainfall, 1990/91 production is pegged at a record 880,000 tons, up slightly over last year. Peanuts are grown mainly on the islands of Java (70 percent) and Sumatra (14 percent). There is no active Indonesian Government program for peanuts as there is for other commodities such as rice and soybeans. The Government's first priority in food production is aimed at maintaining rice self-sufficiency, with its second priority focused on the achievement of soybean self-sufficiency. The Government allocates limited credit to the farmers and they in turn prefer to use it for rice. Despite Indonesia's attempts to increase peanut production through research into improved varieties and input packages, production increases have been small from year to year and are unlikely to change in the near future.

COTTONSEED

Cotton production is a minor crop in Indonesia, resulting in estimated cottonseed output of just 6,000 tons in 1990/91, unchanged for the last 3 years. Cottonseed output is not expected to increase in the future, since net returns to domestically produced cotton are generally below that of alternative crops. Cotton is mainly grown on the south and southeast of Celebes, followed by the islands of Tenggara and Java. Yields are typically low, as cotton is usually planted on dry, non-irrigated, marginal land. In addition, Indonesia's tropical climate and pest problems pose continuous obstacles to efficient and profitable production.

PALM OIL

Palm oil production is by far the largest domestic oil crop grown in Indonesia, estimated at a record 2.35 million tons in 1990/91, accounting for 20 percent of world output. This places Indonesia as the world's second largest palm oil producer, but well behind it's neighbor Malaysia--estimated to produce 6.20 million tons in 1990/91. Palm oil output has virtually set new records every year. With the recent aggressive government programs to stimulate private investment in oil palm development, this sector has begun to increase output at a more rapid pace. With more new trees beginning to bear fruit, output has increased by over 30 percent since 1988/89. The Government's planned oil palm expansion has set a goal of 4.0 million tons of oil by the year 1993, but the cost of corresponding transportation infrastructure and processing facilities will likely slow this progress.

Oil palm is grown throughout the provinces of Indonesia, with the largest area in North Sumatra. Recent expansion has taken place in southern Sumatra, Sulawesi, and Kalimantan, as well as other provinces. The Government's program to encourage the development of oil palm plantations includes liberal licensing policies and the Transmigration Related Nucleus Estate and Smallholders (NES-Trans) program, in order to ensure that small producers will have access to the commercial sector. At present, government controlled plantations account for two-thirds of large shareholder production, the rest by privately financed operations--to date dominated by just three private firms. The Government reports that over the past year dozens of licenses have been issued for new plantations and crushing facilities. Some of these plans will not materialize but expansion of Indonesia's oil palm industry is healthy and is expected to continue to grow in the foreseeable future.

Rod Paschal, Oilseeds Chairperson, (202) 382-8881

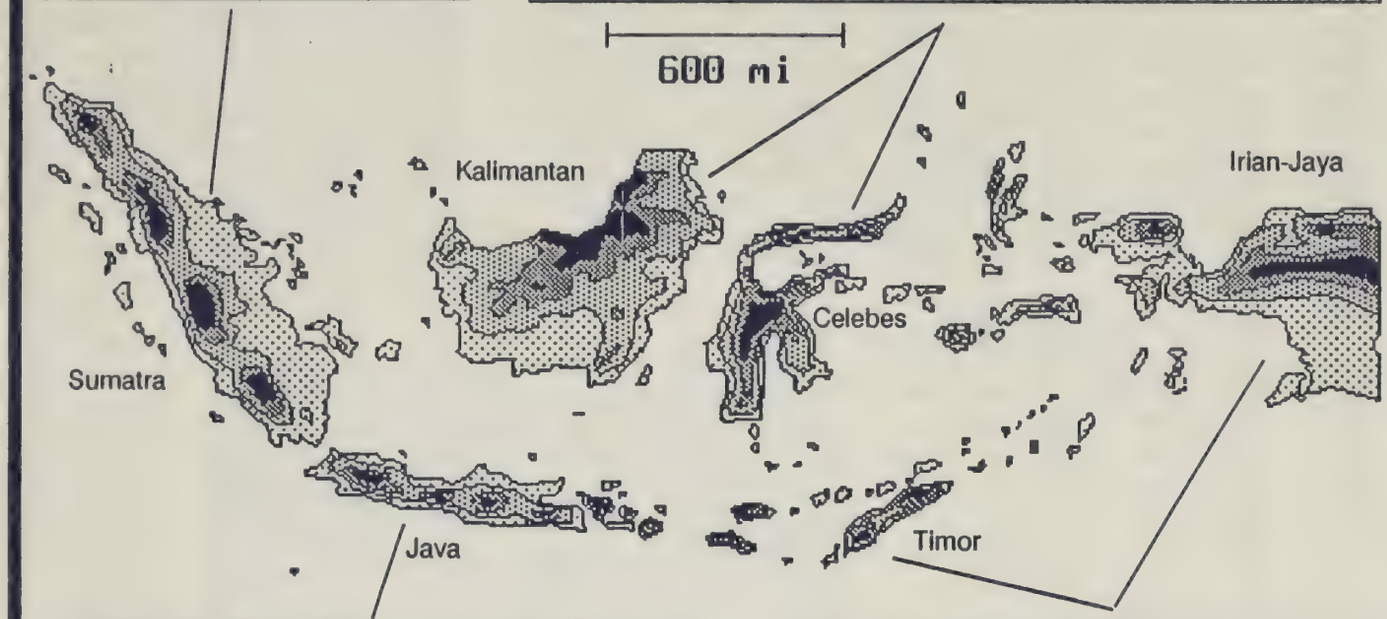
Sumatra

This island is the largest producer of palm oil, accounting for nearly 80 percent of total production. The northeast coast was the site of the orginial oil palm industry and has since spread all along the eastern coast. Nearly 25 percent of all soybeans and 14 percent of peanuts is grown on the island as well.

Kalimantan (Borneo) & Celebes

Under a Government program, Kalimantan's potential growing areas along the west, south, and east coasts are now deforested and oil palm establishment has begun. However, poor roads on peat soils and the lack of sufficient processing facilities are limiting production potential.

Celebes's northeast peninsula is the traditional copra producing region. Besides copra, cotton is grown in the southeastern region and rice and peanuts are planted in rotation on the west coast. The east half of the island is affected by a weather pattern similar to the Philippines, while the western half is more like that of Java, resulting in two seperate crop cycles.



Java

With the most fertile land of all the islands, Java produces over half of all Indonesia's soybeans, particularly on the eastern half of the island. At least 70 percent of Indonesia's peanuts are grown on Java. Oil palm, cotton, and copra are also grown. Domestic soybeans are utilized as tofu by the islanders--produced as a cottage industry. Most imported soybeans are crushed for meal to be used mainly by the poultry industry.

Timor & Irian-Jaya

Timor produces minor amounts of oil palm and copra. Irian-Jaya, consisting of the western half of New Guinea, is under a government program to establish an oil palm industry. However, poor soils and infrastructure have prevented significant development. Some palm trees are now approaching 7-years old--near fruit bearing age--yet the availability of sufficient processing facilities is far in the future.

INDONESIA

POPULATION
184.0 MILLION

AREA (SQ MI)
741,097

ELEVATION (IN FEET)

- = OVER 3280
- = 1640-3280
- = 656-1640
- = UNDER 656

U.S. G.P.O.:1991-281-074:40148/FAS

TABLE 20

Indonesia Oilseeds: Harvested Area, Yield, and Production

	Palm Oil	Copra	Palm Kernel	Cottonseed			Peanut			Soybean			Total Oilseeds 1/	
	Production	Production	Production	Area	Yield	Production	Area	Yield	Production	Area	Yield	Production	Area	Production
	1,000 MT	1,000 MT	1,000 MT	1,000 Ha	MT/Ha	1,000 MT	1,000 Ha	MT/Ha	1,000 MT	1,000 Ha	MT/Ha	1,000 MT	1,000 Ha	1,000 MT
1969/70	217	734	48	6	0.17	1	--	--	--	695	0.72	498	701	1,281
1970/71	248	699	56	6	0.33	2	--	--	--	680	0.76	516	686	1,273
1971/72	269	887	59	8	0.38	3	--	--	--	698	0.74	518	706	1,467
1972/73	290	772	64	12	0.42	5	407	1.19	483	751	0.72	541	1,170	1,865
1973/74	351	656	74	17	0.12	2	409	1.25	512	768	0.77	589	1,194	1,833
1974/75	411	955	84	18	0.11	2	475	1.33	633	752	0.79	590	1,245	2,264
1975/76	434	1,115	82	11	0.27	3	414	1.37	568	646	0.81	522	1,071	2,290
1976/77	497	1,074	92	10	0.20	2	507	1.35	682	646	0.81	523	1,163	2,373
1977/78	532	1,077	99	5	0.20	1	506	1.47	743	733	0.84	617	1,244	2,537
1978/79	641	1,040	113	5	0.20	1	473	1.50	708	784	0.87	680	1,262	2,542
1979/80	702	1,158	121	12	0.17	2	506	1.55	783	732	0.89	653	1,250	2,717
1980/81	752	1,284	133	15	0.27	4	508	1.56	791	810	0.87	704	1,333	2,916
1981/82	884	1,205	144	24	0.33	8	461	1.58	728	608	0.86	521	1,093	2,606
1982/83	983	1,091	161	35	0.34	12	480	1.66	795	640	0.84	536	1,155	2,595
1983/84	1,150	1,225	250	30	0.30	9	523	1.43	747	859	0.90	769	1,412	3,000
1984/85	1,185	1,260	260	26	0.35	9	510	1.48	755	896	0.97	870	1,432	3,154
1985/86	1,280	1,250	285	33	0.33	11	515	1.52	780	970	0.98	950	1,518	3,276
1986/87	1,300	1,270	290	17	0.29	5	516	1.45	750	920	0.98	900	1,453	3,215
1987/88	1,370	1,250	420	17	0.29	5	550	1.43	786	950	1.00	950	1,517	3,411
1988/89	1,600	1,185	430	20	0.30	6	608	1.38	840	1,177	1.02	1,200	1,805	3,661
1989/90	2,150	1,280	550	20	0.30	6	612	1.43	875	1,150	0.96	1,100	1,782	3,811
1990/91	2,350	1,250	605	20	0.30	6	620	1.42	880	1,250	0.96	1,200	1,890	3,941

1/ Total does not include palm oil.

[ ] = Indicates record level.

February 1991

Production Estimates & Crop Assessment Division, FAS, USDA

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Major Crop Production Highlights

Wheat. *Forecast 1990/91 world wheat production is largely unchanged from last month, down slightly but still a record.*

Coarse Grains. *Forecast 1990/91 global coarse grain production is down marginally from last month. Prospective corn and sorghum crops in Argentina are up because of generally excellent growing conditions to date. On the down side, the Brazilian corn crop is forecast lower due to continued dry conditions in the south. In addition, forecast sorghum production in South Africa is below last month's estimate as plantings were less than expected.*

Rice. *Prospective 1990/91 global rice production is forecast down slightly from last month. A smaller crop in Pakistan accounts for most of this month's change.*

Oilseeds. *World oilseed production during 1990/91 is forecast at a record level, up slightly from last month. Larger cottonseed and rapeseed crops more than offset a decline in soybean production. Brazil's soybean crop is estimated at 17.0 million tons, down 0.5 million from February. Dry weather in southern Brazil, particularly in Rio Grande Do Sul, has affected yield potential, however, conditions in the center-west states have been favorable.*

Cotton. *The 1990/91 world cotton crop is projected up slightly from last month. Most of the change in output reflects an upward revision in China's crop to 20.5 million bales. Production was also increased in Pakistan to a record 7.3 million bales.*

Production Articles This Month....

World Cocoa
* * *
World Meat
* * *
World Soybeans
* * *
European Forestry
* * *
Malaysian Palm Oil
* * *
Yugoslav Grain

Approved by the World Agricultural Outlook Board - USDA

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-252), March 11, 1991.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 382-8888 or by FAX (202) 447-7729.

****
* The next issue of World Agricultural Production will be released at 3 p.m. *
* eastern time on April 11, 1991. *
****

CONVERSION TABLE

Metric Tons to Bushels		Metric Tons to 480-lb. Bales	
Wheat & Soybeans	= MT*36.7437	Cotton	= MT*4.592917
Corn, Sorghum, Rye	= MT*39.36825		
Barley	= MT*45.929625		
Oats	= MT*68.894438	Metric Tons to Hundredweight	
1 hectare	= 2.471044 acres	Rice	=MT*22.04622
1 kilogram	= 2.204622 pounds		

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PRODUCTION HIGHLIGHTS FOR 1990/91

March 1991

WHEAT: World production for 1990/91 is estimated at a record 589.0 million metric tons, down marginally from last month but, up 10 percent from last year's harvest. Foreign production is projected at 514.5 million tons, nearly unchanged from last month but up 7 percent from last year. Country highlights are as follows:

- **United States** — Production is estimated at 74.5 million tons, up 34 percent from last year. There was no change this month.
- **East Europe** — Production is estimated at 44.8 million tons, up 0.1 million or less than 1 percent from last month and up 1 percent from last year. Harvested area is estimated up in Bulgaria.
- **South Africa** — Production is estimated at 1.7 million tons, down 0.1 million or 5 percent from last month and down 16 percent from 1989/90. Official South African statistics reported a lower yield.

COARSE GRAINS: World production for 1990/91 is estimated at 825.7 million tons, down 0.2 million or less than 1 percent from last month, but up 3 percent from last year. Foreign production is projected at a record 595.1 million tons, down marginally from last month, but up 2 percent from last year. Country highlights are as follows:

- **United States** — Production is estimated at 230.6 million tons, up 4 percent from last year. There were no changes this month.
- **East Europe** — Production is estimated at 61.5 million tons, up 0.2 million or less than 1 percent from last month, but down 10 percent from last year. Upward yield revisions were made for Bulgarian barley, corn, and oats.
- **Brazil** — Production is estimated at 24.4 million tons, down 0.5 million or 2 percent from last month, but up 8 percent from last year. Corn yield prospects in the center-south growing region were hurt by continued dry weather.
- **Argentina** — Production is estimated at 10.4 million tons, up 0.6 million tons or 6 percent from last month and up 26 percent from last year. Beneficial spring and summer rains have increased estimated yields for corn and sorghum. Growing conditions are reportedly the best in the last five years.

- **South Africa** — Production is estimated at a 6.5 million tons, down 0.4 million or 5 percent from last month and down 36 percent from last year. The decline is attributed to lower estimated sorghum area.

RICE (MILLED-BASIS): World production for 1990/91 is estimated at a record 349.7 million tons, down 0.2 million or less than 1 percent from last month, but up 1 percent from the 1989/90 crop. Foreign production is projected at a record 344.8 million tons. Country highlights are as follows:

- **United States** — Production is estimated at 4.9 million tons, down 4 percent from last season. There was no change this month.

- **Pakistan** — Production is estimated at 3.1 million tons, down 0.4 million or 10 percent from last month and down 2 percent from last year's crop. Harvested area and yields are estimated lower owing to losses in the Basmati rice heartland of Punjab Province.

- **Cambodia** — Production is estimated at a 1.3 million tons, up 0.2 million or 20 percent from last month, but down 22 percent from last year's crop. The increase is due to higher estimated harvested area.

OILSEEDS: Total world oilseeds production during 1990/91 is forecast at a record 217.3 million tons, up 0.4 million from last month and up 3.4 million or 2 percent from 1989/90. Foreign production during 1990/91 is projected to be a record 156.7 million tons, up 0.4 million from last month and up 2.1 million or 1 percent from last year. U.S. total oilseed production is unchanged from last month at an estimated at 60.6 million tons, up 1.3 million or 2 percent from last year.

* **Soybeans:** World production for 1990/91 is estimated at 104.5 million tons, down 0.5 million from last month and down 2.3 million or 2 percent from last year. Total foreign soybean output is estimated at 52.2 million tons, down 0.5 million or 1 percent from last month and down 2.2 million or 4 percent from 1989/90. Country highlights are as follows:

  - **Brazil** — Production is estimated at 17.0 million tons, down 0.5 million or 3 percent from last month and down 15 percent from 1989/90. The persistently dry conditions in the southern state of Rio Grande Do Sul are reducing yield potential. However, excellent rainfall in the center-west states is expected to bolster output.

* **Cottonseed:** World production for 1990/91 is forecast at 34.1 million tons, up 0.5 million or 1 percent from last month and up 2.8 million or 9 percent from last year. Total foreign production is estimated at 28.6 million tons, up 0.5 million or 2 percent from last month and up 1.5 million or 6 percent above last year. Country highlights are as follows:

  - **China** — Production is estimated at 7.6 million tons, up 0.4 million or 6 percent from last month and up 17 percent from last year. The new estimate is based on official Chinese Government statistics and reflects higher-than-expected cotton yields.

  - **Pakistan** — Production is estimated at a record 3.2 million tons, up 0.1 million or 4 percent from last month and up 9 percent from last year's crop. Cotton yields improved considerably owing to better supplies of fertilizer and irrigation water. Pest damage remained insignificant.

* **Peanuts:** World production for 1990/91 is forecast at 21.4 million tons, down marginally from last month and down 0.5 million or 2 percent from 1989/90. Total foreign production is estimated at 19.8 million tons, down marginally from last month and down 0.3 million tons or 2 percent from 1989/90.

* **Sunfloverseed:** World production for 1990/91 is forecast at 21.7 million tons, up 0.1 million or less than 1 percent from last month, but down 0.3 million or 1 percent from last year. Total foreign production is estimated at 20.6 million tons, up 0.1 million or less than 1 percent from last month, but down 0.5 million or 3 percent from last year. Country highlights are as follows:

  - **South Africa:** Production is estimated at a record 0.7 million tons, up 0.2 million or 40 percent from last month and up 35 percent from last year. The combination of a record 575,000 hectares and timely rains in January and February is expected to boost production to a new high.

* **Rapeseed:** World production for 1990/91 is forecast at a record 24.9 million tons, up 0.3 million or 1 percent from last month and up 3.0 million or 14 percent from last year. Country highlights are as follows:

  - **China** — Production is estimated at a record 6.9 million tons, up 0.3 million or 5 percent from last month and up 27 percent from last year. The new estimate is based on official Chinese Government statistics. Production increased significantly in 1990 due to record planted area and excellent yields.

* **Flaxseed:** World production for 1990/91 is forecast at 2.3 million tons, unchanged from last month, but up 0.5 million or 26 percent from last year. While production by the United States is small, this year's output is expected to increase by 213 percent over last year, to 97,000 tons. Total foreign production is pegged at 2.2 million tons, unchanged from last month, but up 0.4 million or 23 percent from last year. There were no changes this month.

* **Copra:** World production for 1990/91 is forecast at 4.9 million tons, up marginally from last month and up 0.1 million or 3 percent over last year. Copra production reached a record 5.3 million in 1985/86. There were no significant country changes this month.

* **Palm Kernels:** World production for 1990/91 is forecast at a record 3.4 million tons, down marginally from last month, but up over 2 percent from last year. There were no significant country changes this month.

* **Palm Oil:** World production for 1990/91 is forecast at a record 11.1 million tons, up 79,000 tons or less than 1 percent from last month and up 167,000 tons or over 1 percent from last year. Country highlights are as follows:

  - **Indonesia:** Production is estimated at 2.5 million tons, up 0.1 million or 4 percent from last month and up 9 percent from last year. The U.S. agricultural attache in Jakarta revised the estimates for palm oil output for 1988/89, 1989/90, and 1990/91. Production changes are attributed to the increase of tree plantings over the past several years, especially from private companies.

COTTON: World cotton production in 1990/91 is estimated at 87.6 million bales, up 1.5 million bales or 2 percent from last month and up 7.6 million bales or 10 percent from last year. Foreign production is estimated at 72 million bales, up 1.5 million from last month and up 4.2 million bales or 6 percent from the 1989/90 estimate. Country highlights are as follows:

  - **United States** Production is estimated at 15.6 million bales, up 3.4 million or 28 percent from last year. There was no change this month.

  - **China** Production is estimated at 20.5 million bales, up 1.2 million or 6 percent from last month and up 18 percent from last year. The change is based on the latest official estimate from the State Statistical Bureau. Higher cotton prices and generally favorable weather were credited for the increase in production.

- **Pakistan** — Production is estimated at a record 7.3 million bales, up 0.3 million or 4 percent from last month, and up 9 percent from last year. Yields were forecast higher due to increased use of fertilizer and excellent harvesting conditions. Pest damage previously reported in Punjab Province has proven insignificant.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	1990/91	1988/89	1989/90	Feb.	Mar.	1988/89	1989/90	Feb.	Mar.
	--Million Acres--			--Million Acres--			--Bushels per Acre--				--Million Bushels--			
All Wheat	65.5	76.6	77.3	53.2	62.2	69.4	34.1	32.7	39.5	39.5	1,812	2,037	2,739	2,739
Winter	48.8	55.1	57.0	39.8	41.5	50.0	39.2	35.0	40.7	40.7	1,562	1,455	2,033	2,033
Other	16.7	21.5	20.3	13.4	20.7	19.4	18.7	28.1	36.4	36.4	250	582	705	705
Rye	2.4	2.0	1.6	0.6	0.5	0.4	24.7	28.2	27.1	27.1	15	14	10	10
Soybeans	58.8	60.8	57.8	57.4	59.5	56.5	27.0	32.3	34.0	34.0	1,549	1,924	1,922	1,922
Corn	67.7	72.2	74.2	58.3	64.7	67.0	84.6	116.3	118.5	118.5	4,929	7,525	7,933	7,933
Sorghum	10.3	12.6	10.5	9.0	11.1	9.1	63.8	55.4	62.9	62.9	577	615	571	571
Barley	9.8	9.1	8.2	7.6	8.3	7.5	38.0	48.6	55.9	55.9	290	404	419	419
Oats	13.9	12.1	10.4	5.5	6.9	5.9	39.3	54.3	60.1	60.1	218	374	357	357
							--Pounds per Acre--				---Million CWT.---			
Rice	2.9	2.7	2.9	2.9	2.7	2.8	5,514	5,749	5,507	5,507	159.9	154.5	154.9	154.9
											---Million 480-Pound---			
All Cotton	12.5	10.6	12.4	11.9	9.5	11.7	619	614	640	640	15.4	12.2	15.6	15.6

1/ Source: All estimates are provided by the National Agricultural Statistics Service (NASS) of the United States Department of Agriculture, and are published in the Crop Production circular available from NASS.

World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			USSR	Asia					South America		Selected Other			All Other Countries
			United States	Canada	Mexico	EC-12	Oth. W. Europe	Eastern Europe		China	India	Indo-nesia	Paki-stan	Thai-land	Argen-tina	Brazil	Aus-tralia	South Africa	Turkey	
	—Million Metric Tons—																			
Wheat																				
1988/89	500.4	451.1	49.3	16.0	3.2	74.7	3.8	44.8	84.4	85.4	46.2	0.0	12.7	0.0	8.4	5.8	14.1	3.5	15.0	17.0
1989/90 prel.	536.8	481.3	55.4	24.6	4.0	78.3	4.4	44.3	92.3	90.8	54.1	0.0	14.4	0.0	10.2	5.6	14.1	2.0	11.5	15.4
1990/91 proj.																				
February	589.0	514.5	74.5	31.8	3.9	80.6	5.0	44.7	108.0	96.5	49.7	0.0	14.3	0.0	11.2	3.2	15.7	1.8	14.0	17.4
March	589.0	514.5	74.5	31.8	3.9	80.6	5.0	44.8	108.0	96.5	49.7	0.0	14.3	0.0	11.2	3.2	15.7	1.7	14.0	17.4
Coarse Grains																				
1988/89	731.2	581.5	149.7	19.7	13.8	88.1	11.4	61.3	97.5	94.2	31.3	5.2	2.4	4.4	7.3	26.7	6.7	13.0	10.0	88.7
1989/90 prel.	803.5	582.1	221.4	23.5	14.1	82.3	12.4	68.1	104.8	94.6	34.6	5.0	2.8	4.2	8.3	22.7	6.9	10.1	7.5	80.3
1990/91 proj.																				
February	825.8	595.3	230.6	26.0	16.3	76.8	13.3	61.4	114.0	104.7	35.0	5.3	2.9	4.0	9.8	24.9	6.8	6.8	8.9	78.4
March	825.7	595.1	230.6	26.0	16.3	76.9	13.3	61.5	114.0	104.7	35.0	5.3	2.9	4.0	10.4	24.4	6.8	6.5	8.9	78.2
Rice (Milled)																				
1988/89	330.9	325.7	5.2	0.0	0.3	1.3	0.0	0.2	1.9	118.4	70.5	27.5	3.2	14.0	0.3	7.5	0.6	0.0	0.2	23.8
1989/90	344.8	339.7	5.1	0.0	0.4	1.4	0.0	0.2	1.7	126.1	74.1	29.1	3.2	13.7	0.2	5.0	0.7	0.0	0.2	23.5
1990/91																				
February	349.9	345.0	4.9	0.0	0.3	1.6	0.0	0.2	1.7	129.5	75.0	29.2	3.5	12.0	0.3	6.7	0.5	0.0	0.2	23.7
March	349.7	344.8	4.9	0.0	0.2	1.6	0.0	0.2	1.7	129.5	75.0	29.2	3.1	12.0	0.3	6.7	0.5	0.0	0.2	23.9
Total Grains 1/																				
1988/89	1,562.6	1,358.4	204.2	35.7	17.2	164.1	15.2	106.3	183.8	298.0	148.0	32.7	18.2	18.5	16.0	40.0	21.4	16.6	25.2	201.7
1989/90 prel.	1,685.0	1,403.1	281.9	48.0	18.5	162.0	16.7	112.6	198.8	311.5	162.7	34.1	20.4	17.9	18.7	33.3	21.7	12.2	19.2	194.9
1990/91 proj.																				
February	1,764.8	1,454.8	310.0	57.8	20.4	159.0	18.3	106.3	223.7	330.7	159.6	34.5	20.7	16.0	21.3	34.8	23.0	8.6	23.1	196.9
March	1,764.4	1,454.3	310.0	57.8	20.4	159.1	18.3	106.6	223.7	330.7	159.6	34.5	20.3	16.0	21.9	34.3	23.0	8.2	23.1	196.8
Oilseeds 2/																				
1988/89	203.7	153.4	50.3	5.9	1.0	11.5	0.6	5.1	13.3	30.6	19.3	2.0	3.2	0.8	10.7	24.6	0.8	0.8	2.3	21.0
1989/90 prel.	213.9	154.6	59.2	4.9	1.4	11.0	0.7	6.0	14.0	28.4	19.4	2.0	3.3	0.9	15.9	21.4	2.4	1.0	2.3	19.6
1990/91 proj.																				
February	216.9	156.4	60.6	5.7	0.9	12.3	0.8	5.2	13.4	32.2	19.5	2.1	3.4	0.7	15.1	19.0	1.0	0.8	2.1	22.2
March	217.3	156.7	60.6	5.7	0.9	12.3	0.8	5.2	13.4	33.0	19.5	2.1	3.6	0.7	15.1	18.5	1.0	1.1	2.1	21.9
	—Million 480-Pound Bales—																			
Cotton																				
1988/89	84.7	69.3	15.4	0.0	1.4	1.6	0.0	0.1	12.7	19.1	8.3	0.0	6.5	0.2	0.9	3.4	1.3	0.4	3.0	10.5
1989/90 prel.	79.9	67.7	12.2	0.0	0.8	1.5	0.0	0.1	12.3	17.4	10.4	0.0	6.7	0.1	1.3	3.0	1.4	0.3	2.8	9.6
1990/91 proj.																				
February	86.1	70.4	15.6	0.0	0.8	1.5	0.0	0.1	12.0	19.3	9.8	0.0	7.0	0.2	1.4	3.4	1.6	0.2	3.0	10.3
March	87.6	72.0	15.6	0.0	0.8	1.5	0.0	0.1	12.0	20.5	9.8	0.0	7.3	0.1	1.4	3.4	1.6	0.2	3.0	10.3

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains and pulses are 195.1 million tons in 1988/89, 210.9 million in 1989/90, and 235.0 million forecast in 1990/91.

2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also include copra and palm kernels for all countries.

Note: Entries of 0.0 indicate no reported or insignificant production.

MARCH 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 3

Wheat Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1988/89	Prel. 1989/90	Proj. 1990/91	1988/89	Prel. 1989/90	1990/91 Proj. Feb.	March	1988/89	Prel. 1989/90	1990/91 Proj. Feb.	March
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	218.0	225.5	230.8	2.30	2.38	2.55	2.55	500.4	536.8	589.0	589.0
United States	21.5	25.2	28.1	2.29	2.20	2.66	2.66	49.3	55.4	74.5	74.5
Total Foreign	196.5	200.3	202.8	2.30	2.40	2.54	2.54	451.1	481.3	514.5	514.5
Maj. Foreign Exporters	42.1	44.2	45.6	2.69	2.87	3.06	3.06	113.1	127.2	139.3	139.3
Argentina	4.7	5.5	5.9	1.79	1.86	1.90	1.90	8.4	10.2	11.2	11.2
Australia	8.9	8.9	9.9	1.58	1.58	1.59	1.59	14.1	14.1	15.7	15.7
Canada	13.0	13.6	14.1	1.23	1.80	2.26	2.26	16.0	24.6	31.8	31.8
EC-12	15.5	16.2	15.7	4.82	4.83	5.12	5.12	74.7	78.3	80.6	80.6
Major Importers	95.9	97.2	98.0	2.39	2.50	2.69	2.68	229.3	242.5	263.1	263.1
Brazil	3.5	3.4	3.3	1.68	1.65	0.97	0.97	5.8	5.6	3.2	3.2
China	28.8	29.8	30.3	2.97	3.04	3.18	3.18	85.4	90.8	96.5	96.5
Eastern Europe	10.7	10.6	10.7	4.17	4.16	4.20	4.17	44.8	44.3	44.7	44.8
Egypt	0.6	0.6	0.7	4.76	5.05	5.71	5.71	2.8	3.2	4.0	4.0
Other N. Africa 1/	4.0	4.7	5.2	1.26	1.13	1.08	1.08	5.0	5.3	5.6	5.6
Japan	0.3	0.3	0.3	3.62	3.47	3.77	3.66	1.0	1.0	1.0	1.0
USSR	48.1	47.7	47.5	1.76	1.94	2.27	2.27	84.4	92.3	108.0	108.0
Other Foreign	58.5	58.9	59.2	1.86	1.89	1.89	1.89	108.6	111.7	112.1	112.0
India	23.1	24.1	23.5	2.00	2.24	2.12	2.12	46.2	54.1	49.7	49.7
Iran	6.6	6.0	6.1	1.11	0.97	1.00	1.00	7.3	5.8	6.1	6.1
Mexico	0.8	1.0	0.9	4.00	4.21	4.59	4.59	3.2	4.0	3.9	3.9
Non-EC W. Europe	0.8	0.8	0.9	4.85	5.19	5.46	5.46	3.8	4.4	5.0	5.0
Pakistan	7.3	7.7	7.8	1.73	1.87	1.84	1.84	12.7	14.4	14.3	14.3
South Africa	2.0	1.8	1.7	1.78	1.11	1.05	1.00	3.5	2.0	1.8	1.7
Turkey	8.8	8.7	8.8	1.71	1.32	1.60	1.60	15.0	11.5	14.0	14.0
Others	9.3	8.8	9.6	1.83	1.76	1.79	1.81	17.0	15.4	17.4	17.4

1/ Algeria, Libya, Morocco, and Tunisia.

MARCH 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1988/89	Prel. 1989/90	Proj. 1990/91	1988/89	Prel. 1989/90	1990/91 Proj. Feb.	Mar.	1988/89	Prel. 1989/90	1990/91 Proj. Feb.	Mar.
TOTAL COARSE GRAINS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World 1/	325.9	321.9	321.8	2.24	2.50	2.57	2.57	731.2	803.5	825.8	825.7
United States	32.8	37.0	36.4	4.56	5.98	6.34	6.34	149.7	221.4	230.6	230.6
Total Foreign	293.1	284.9	285.5	1.98	2.04	2.09	2.08	581.5	582.1	595.3	595.1
Maj. Foreign Exporters	20.7	21.3	20.6	2.47	2.49	2.57	2.61	51.1	53.1	53.4	53.6
Argentina	2.9	3.1	3.4	2.49	2.65	2.90	3.07	7.3	8.3	9.8	10.4
Australia	4.3	4.0	4.2	1.56	1.71	1.60	1.60	6.7	6.9	6.8	6.8
Canada	7.1	8.3	8.0	2.76	2.84	3.24	3.24	19.7	23.5	26.0	26.0
South Africa	4.6	4.4	3.4	2.86	2.32	1.88	1.88	13.0	10.1	6.8	6.5
Thailand	1.8	1.6	1.5	2.50	2.71	2.67	2.67	4.4	4.2	4.0	4.0
Major Importers	106.3	103.7	101.4	2.57	2.73	2.79	2.80	273.5	283.0	283.2	283.5
Eastern Europe	18.2	18.1	17.9	3.37	3.76	3.42	3.43	61.3	68.1	61.4	61.5
EC-12	19.2	18.6	17.7	4.60	4.43	4.35	4.35	88.1	82.3	76.8	76.9
Other W. Europe	3.2	3.1	3.0	3.52	3.97	4.40	4.40	11.4	12.4	13.3	13.3
Mexico	7.5	7.5	8.3	1.85	1.88	1.96	1.96	13.8	14.1	16.3	16.3
USSR	57.8	56.0	54.0	1.69	1.87	2.11	2.11	97.5	104.8	114.0	114.0
Other Major Import. 2/	0.5	0.4	0.4	3.40	3.35	3.32	3.31	1.5	1.4	1.4	1.4
Other Foreign	166.0	159.8	163.5	1.55	1.54	1.59	1.58	256.9	246.1	258.7	258.0
Brazil	13.4	12.7	13.6	2.00	1.80	1.84	1.80	26.7	22.7	24.9	24.4
China	28.3	28.5	29.2	3.33	3.32	3.59	3.59	94.2	94.6	104.7	104.7
India	38.7	37.7	38.9	0.81	0.92	0.90	0.90	31.3	34.6	35.0	35.0
Indonesia	2.9	2.7	2.9	1.82	1.85	1.83	1.83	5.2	5.0	5.3	5.3
Nigeria	10.1	9.9	9.7	0.84	0.82	0.78	0.78	8.5	8.1	7.6	7.6
Philippines	3.8	3.6	3.8	1.21	1.24	1.24	1.24	4.5	4.5	4.7	4.7
Turkey	4.4	4.4	4.5	2.29	1.70	1.99	1.99	10.0	7.5	8.9	8.9
Others	64.6	60.3	61.0	1.18	1.15	1.12	1.10	76.5	69.0	67.6	67.4
BARLEY											
World	78.2	74.9	74.7	2.15	2.27	2.45	2.43	167.8	169.6	181.4	181.5
United States	3.1	3.4	3.0	2.04	2.62	3.00	3.00	6.3	8.8	9.1	9.1
Total Foreign	75.1	71.5	71.6	2.15	2.25	2.43	2.41	161.5	160.8	172.3	172.4
Australia	2.2	2.4	2.5	1.48	1.73	1.59	1.59	3.3	4.1	4.0	4.0
Canada	4.2	4.7	4.6	2.46	2.50	2.93	2.93	10.2	11.7	13.5	13.5
China	3.7	3.3	3.3	1.67	1.74	1.73	1.73	6.2	5.7	5.7	5.7
Eastern Europe	4.5	4.5	4.5	3.78	4.31	4.33	4.33	17.1	19.3	19.5	19.6
EC-12	12.2	11.8	11.4	4.13	3.95	4.03	4.03	50.2	46.4	46.0	46.0
Other W. Europe	1.7	1.5	1.5	3.28	3.87	4.26	4.26	5.7	5.9	6.2	6.2
Turkey	3.3	3.4	3.4	2.12	1.46	1.76	1.76	7.0	4.9	6.0	6.0
USSR	29.7	27.6	26.0	1.50	1.75	2.19	2.19	44.5	48.5	57.0	57.0
Others	13.5	12.5	14.4	1.28	1.16	1.05	0.99	17.3	14.5	14.4	14.3

FOOTNOTES AT END OF TABLE

CONTINUED

TABLE 4 (Continued)

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1988/89	Prel. 1989/90	Proj. 1990/91	1988/89	Prel. 1989/90	1990/91 Proj. Feb.	1990/91 Proj. Mar.	1988/89	Prel. 1989/90	1990/91 Proj. Feb.	1990/91 Proj. Mar.
CORN	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	125.2	126.2	127.6	3.20	3.67	3.69	3.69	400.8	462.8	470.6	470.7
United States	23.6	26.2	27.1	5.31	7.30	7.44	7.44	125.2	191.2	201.5	201.5
Total Foreign	101.6	100.0	100.5	2.71	2.72	2.68	2.68	275.6	271.7	269.1	269.1
Maj. Foreign Exporters	7.1	6.7	6.1	3.05	2.78	2.70	2.77	21.6	18.6	16.5	16.9
Argentina	1.7	1.7	2.0	2.94	3.06	3.40	3.60	5.0	5.2	6.8	7.2
South Africa	3.8	3.6	2.8	3.28	2.62	2.14	2.14	12.4	9.4	6.0	6.0
Thailand	1.6	1.4	1.3	2.63	2.86	2.85	2.85	4.2	4.0	3.7	3.7
Major Importers	22.0	21.2	21.2	3.82	3.95	3.41	3.42	83.9	83.8	72.2	72.3
Eastern Europe	7.1	7.1	6.8	3.78	4.21	3.31	3.33	26.9	29.8	22.6	22.7
EC-12	4.1	3.9	3.4	7.00	6.93	6.26	6.27	28.5	26.8	21.5	21.6
Other W. Europe	0.2	0.2	0.2	8.55	7.68	7.43	7.43	1.9	1.7	1.6	1.6
Mexico	6.0	5.8	6.6	1.68	1.68	1.82	1.82	10.1	9.8	12.0	12.0
USSR	4.4	4.1	4.0	3.62	3.71	3.50	3.50	16.0	15.3	14.0	14.0
Other Maj. Import. 2/	0.1	0.1	0.1	4.20	4.19	4.14	4.14	0.4	0.5	0.5	0.5
Other Foreign	72.6	72.1	73.2	2.34	2.35	2.46	2.46	170.1	169.2	180.4	179.9
Brazil	12.9	12.1	13.0	2.02	1.80	1.85	1.81	26.1	21.8	24.0	23.5
Canada	1.0	1.0	1.0	5.47	6.36	7.00	7.00	5.4	6.4	7.0	7.0
China	19.7	20.4	21.0	3.93	3.88	4.19	4.19	77.4	78.9	88.0	88.0
Egypt	0.8	0.8	0.8	5.20	5.37	5.41	5.43	4.3	4.5	4.6	4.6
India	5.9	5.9	5.9	1.40	1.61	1.61	1.61	8.2	9.4	9.5	9.5
Indonesia	2.9	2.7	2.9	1.82	1.85	1.83	1.83	5.2	5.0	5.3	5.3
Philippines	3.8	3.6	3.8	1.21	1.24	1.24	1.24	4.5	4.5	4.7	4.7
Zimbabwe	1.2	1.2	1.1	1.56	1.69	1.74	1.81	1.9	1.9	2.0	1.9
Others	24.4	24.4	23.7	1.52	1.50	1.49	1.49	37.1	36.7	35.3	35.4
SORGHUM											
World	42.3	41.3	40.1	1.30	1.36	1.36	1.36	55.2	56.2	54.6	54.4
United States	3.7	4.5	3.7	4.00	3.48	3.95	3.95	14.6	15.6	14.5	14.5
Total Foreign	38.6	36.8	36.4	1.05	1.10	1.10	1.10	40.5	40.6	40.1	39.9
Argentina	0.6	0.7	0.7	2.33	2.86	3.00	3.29	1.4	2.0	2.1	2.3
Australia	0.6	0.4	0.5	1.99	2.27	2.00	2.00	1.3	0.9	0.9	0.9
China	1.8	1.8	1.8	3.14	2.94	3.22	3.22	5.6	5.4	5.8	5.8
India	14.6	14.9	15.0	0.70	0.86	0.83	0.83	10.2	12.9	12.5	12.5
Mexico	1.1	1.3	1.3	2.83	2.88	2.85	2.85	3.1	3.8	3.7	3.7
Nigeria	4.4	4.4	4.4	0.80	0.80	0.75	0.75	3.5	3.5	3.3	3.3
South Africa	0.3	0.2	0.1	1.58	1.47	1.65	1.30	0.4	0.4	0.5	0.2
Sudan	5.3	3.1	3.0	0.83	0.52	0.50	0.50	4.4	1.6	1.5	1.5
Thailand	0.2	0.2	0.2	1.35	1.44	1.39	1.39	0.2	0.2	0.3	0.3
Others	9.8	9.7	9.4	1.07	1.02	1.01	1.01	10.4	9.9	9.5	9.5

FOOTNOTES AT END OF TABLE

CONTINUED

MARCH 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4 (Continued)

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Feb.	Mar.	1988/89	1989/90	Feb.	Mar.
OATS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	22.1	22.7	21.6	1.70	1.84	1.99	1.99	37.5	41.7	42.9	42.9
United States	2.2	2.8	2.4	1.41	1.95	2.16	2.16	3.2	5.4	5.2	5.2
Total Foreign	19.9	19.9	19.2	1.73	1.83	1.96	1.97	34.3	36.3	37.7	37.7
USSR	10.9	10.8	10.5	1.40	1.57	1.67	1.67	15.3	16.8	17.5	17.5
Maj. Foreign Exporters	3.5	3.7	3.5	1.91	1.97	2.12	2.12	6.6	7.3	7.4	7.4
Argentina	0.4	0.4	0.5	1.27	1.44	1.33	1.33	0.5	0.6	0.6	0.6
Australia	1.3	1.1	1.2	1.40	1.44	1.42	1.42	1.9	1.6	1.7	1.7
Canada	1.4	1.7	1.5	2.18	2.08	2.33	2.33	3.0	3.5	3.5	3.5
Sweden	0.4	0.4	0.4	3.14	3.54	4.51	4.51	1.3	1.5	1.6	1.6
Other Foreign	5.4	5.4	5.2	2.28	2.25	2.45	2.46	12.4	12.2	12.9	12.9
China	0.6	0.6	0.6	1.19	1.15	1.21	1.21	0.7	0.6	0.7	0.7
Eastern Europe	1.4	1.4	1.3	2.63	2.67	2.87	2.90	3.7	3.6	3.7	3.7
East Germany	0.1	0.1	0.1	3.43	3.33	4.14	4.14	0.5	0.5	0.6	0.6
Poland	0.9	0.8	0.7	2.61	2.72	2.78	2.78	2.2	2.2	2.1	2.1
EC-12	1.8	1.7	1.6	3.11	2.78	3.09	3.09	5.5	4.7	4.9	4.8
France	0.3	0.3	0.2	3.77	3.78	3.80	3.80	1.0	1.0	0.9	0.9
West Germany	0.6	0.5	0.5	4.23	3.78	4.37	4.37	2.4	1.9	2.1	2.1
Finland	0.4	0.4	0.5	2.21	3.24	3.67	3.67	0.9	1.4	1.7	1.7
Norway	0.1	0.1	0.1	3.02	3.13	4.58	4.58	0.4	0.4	0.6	0.6
Others	1.2	1.3	1.2	1.09	1.10	1.11	1.11	1.3	1.4	1.4	1.4
RYE											
World	15.9	16.9	16.8	2.08	2.22	2.31	2.31	33.0	37.6	38.8	38.8
United States	0.2	0.2	0.2	1.55	1.77	1.70	1.70	0.4	0.3	0.3	0.3
Total Foreign	15.6	16.7	16.7	2.09	2.23	2.32	2.32	32.6	37.3	38.6	38.6
USSR	10.1	10.7	10.5	1.83	1.87	2.00	2.00	18.5	20.1	21.0	21.0
Maj. Foreign Exporter											
Canada	0.3	0.5	0.5	1.04	1.74	1.74	1.74	0.3	0.9	0.9	0.9
Other Foreign											
Eastern Europe	3.9	3.9	4.1	2.59	2.99	2.91	2.91	10.0	11.8	11.9	11.9
East Germany	0.6	0.6	0.6	2.94	3.34	3.19	3.19	1.8	2.1	2.1	2.1
Poland	2.9	2.9	3.1	2.52	2.95	2.84	2.84	7.2	8.6	8.7	8.7
Czechoslovakia	0.2	0.2	0.2	3.42	4.05	4.26	4.26	0.5	0.7	0.7	0.7
EC-12	0.9	1.0	1.0	3.05	3.31	3.46	3.46	2.9	3.2	3.3	3.3
Denmark	0.1	0.1	0.1	4.52	4.80	4.90	4.90	0.4	0.5	0.5	0.5
West Germany	0.4	0.4	0.4	4.19	4.69	4.72	4.72	1.6	1.8	2.0	2.0
Others	0.5	0.6	0.6	2.06	2.28	2.51	2.51	1.0	1.3	1.4	1.4

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.
2/ Japan, Republic of Korea, and Taiwan.

MARCH 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 5

Rice Area, Yield, and Production
World and Selected Countries and Regions

	AREA			YIELD				PRODUCTION (Rough Basis)				MILLING RATE				PRODUCTION (Milled Basis)			
	1988/89	Prel. 1989/90	Proj. 1990/91	1988/89	Prel. 1989/90	1990/91 Proj. Feb.	March	1988/89	Prel. 1989/90	1990/91 Proj. Feb.	March	1988/89	Prel. 1989/90	1990/91 Proj. Feb.	March	1988/89	Prel. 1989/90	1990/91 Proj. Feb.	March
	—Million Hectares—			—Metric Tons Per Hectare—				—Million Metric Tons—				—In Percent—				—Million Metric Tons—			
World	145.5	146.7	147.0	3.4	3.5	3.5	3.5	488.9	509.3	517.1	516.8	67.7	67.7	67.7	67.7	330.9	344.8	349.9	349.7
United States	1.2	1.1	1.1	6.2	6.4	6.2	6.2	7.3	7.0	7.0	7.0	71.5	73.0	70.0	70.0	5.2	5.1	4.9	4.9
Total Foreign	144.3	145.6	145.8	3.3	3.4	3.5	3.5	481.7	502.3	510.0	509.7	67.6	67.6	67.6	67.5	325.7	339.7	345.0	344.8
Maj. Foreign Exporters	16.5	17.0	16.6	2.3	2.3	2.2	2.2	38.6	39.1	37.4	36.9	64.1	64.0	63.8	63.8	24.7	25.0	23.9	23.5
Burma	4.5	4.7	4.9	2.8	2.9	2.9	2.9	12.5	13.5	14.0	14.0	60.0	60.0	60.0	60.0	7.5	8.1	8.4	8.4
Pakistan	2.0	2.1	2.0	2.4	2.3	2.5	2.3	4.8	4.8	5.3	4.7	66.7	66.7	66.7	66.7	3.2	3.2	3.5	3.1
Thailand	9.9	10.2	9.7	2.1	2.0	1.9	1.9	21.3	20.8	18.2	18.2	66.0	66.0	66.0	66.0	14.0	13.7	12.0	12.0
Major Importers	13.0	13.8	13.7	4.3	4.2	4.3	4.3	55.8	58.3	58.4	58.5	66.1	66.0	66.0	66.0	36.9	38.5	38.5	38.6
EC-12	0.3	0.3	0.4	5.6	6.2	6.3	6.3	2.0	2.1	2.3	2.3	67.3	67.0	67.3	67.3	1.3	1.4	1.6	1.6
Indonesia	9.8	10.5	10.3	4.3	4.2	4.4	4.4	42.3	44.7	45.0	45.0	65.0	65.0	65.0	65.0	27.5	29.1	29.2	29.2
Nigeria	0.6	0.6	0.7	1.3	1.4	1.4	1.4	0.8	0.9	0.9	0.9	60.0	60.0	60.0	60.0	0.5	0.5	0.5	0.5
Republic of Korea	1.3	1.3	1.2	6.6	6.5	6.3	6.3	8.4	8.2	7.8	7.8	72.3	72.0	72.0	72.0	6.1	5.9	5.6	5.6
Other Maj. Import. 1/	1.0	1.0	1.1	2.3	2.4	2.4	2.3	2.3	2.5	2.4	2.5	65.4	65.5	65.6	65.5	1.5	1.6	1.6	1.6
Other Foreign	114.8	114.8	115.5	3.4	3.5	3.6	3.6	387.3	404.9	414.2	414.4	68.2	68.2	68.2	68.2	264.1	276.2	282.6	282.7
Australia	0.1	0.1	0.1	8.2	8.0	8.1	8.1	0.8	0.9	0.7	0.7	71.5	71.5	71.5	71.5	0.6	0.7	0.5	0.5
Bangladesh	10.2	10.5	10.6	2.3	2.6	2.6	2.6	23.3	27.0	27.2	27.2	66.7	66.7	66.7	66.7	15.6	18.0	18.1	18.1
Brazil	5.3	4.2	4.8	2.1	1.8	2.0	2.0	11.0	7.4	9.8	9.8	68.0	68.0	68.0	68.0	7.5	5.0	6.7	6.7
China	31.9	32.7	32.7	5.3	5.5	5.7	5.7	169.1	180.1	185.0	185.0	70.0	70.0	70.0	70.0	118.4	126.1	129.5	129.5
India	41.7	42.2	42.2	2.5	2.6	2.7	2.7	105.7	111.1	112.5	112.5	66.7	66.7	66.7	66.7	70.5	74.1	75.0	75.0
Japan	2.1	2.1	2.1	5.9	6.2	6.4	6.3	12.4	12.9	13.2	13.1	72.8	72.8	72.8	72.8	9.0	9.4	9.6	9.6
Philippines	3.5	3.4	3.5	2.6	2.6	2.7	2.7	9.2	8.9	9.4	9.4	65.0	65.0	65.0	65.0	6.0	5.8	6.1	6.1
USSR	0.7	0.7	0.7	4.3	3.9	4.0	4.0	2.9	2.6	2.6	2.6	65.0	65.0	65.0	65.0	1.9	1.7	1.7	1.7
Vietnam	5.8	5.9	5.9	2.9	3.1	3.1	3.1	16.8	18.4	18.0	18.0	65.0	65.0	65.0	65.0	10.9	12.0	11.7	11.7
Others	13.5	13.0	13.1	2.7	2.7	2.8	2.7	36.0	35.5	35.8	36.1	66.1	66.1	66.2	66.1	23.8	23.5	23.7	23.9

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Feb.	Mar.	1988/89	1989/90	Feb.	Mar.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SOYBEANS											
World	55.87	58.03	54.77	1.71	1.84	1.92	1.91	95.55	106.78	105.07	104.53
United States	23.22	24.09	22.87	1.82	2.17	2.29	2.29	42.15	52.35	52.30	52.30
Total Foreign	32.65	33.94	31.90	1.64	1.60	1.65	1.64	53.40	54.43	52.77	52.23
Maj. Foreign Exporters	16.17	16.35	14.80	1.84	1.88	1.88	1.84	29.70	30.75	27.80	27.30
Argentina	4.00	4.95	4.90	1.63	2.17	2.10	2.10	6.50	10.75	10.30	10.30
Brazil	12.17	11.40	9.90	1.91	1.75	1.77	1.72	23.20	20.00	17.50	17.00
Other Foreign	16.48	17.59	17.10	1.44	1.35	1.46	1.46	23.70	23.68	24.97	24.93
Canada	0.53	0.54	0.50	2.16	2.26	2.63	2.63	1.15	1.22	1.33	1.33
China	8.12	8.06	7.63	1.43	1.27	1.51	1.51	11.65	10.23	11.50	11.50
Eastern Europe	0.56	0.54	0.54	1.20	1.51	1.31	1.31	0.67	0.82	0.71	0.71
EC-12	0.53	0.61	0.66	3.10	3.19	2.82	2.82	1.66	1.95	1.85	1.85
India	1.73	2.13	2.20	0.89	0.80	0.95	0.95	1.55	1.72	2.10	2.10
Indonesia	1.18	1.15	1.25	1.02	0.96	0.96	0.96	1.20	1.10	1.20	1.20
Paraguay	0.85	0.98	0.98	1.90	1.53	1.63	1.63	1.62	1.50	1.60	1.60
USSR	0.76	0.83	0.84	1.16	1.15	1.10	1.10	0.88	0.96	0.92	0.92
Others	2.21	2.74	2.50	1.51	1.53	1.51	1.48	3.33	4.19	3.76	3.72
COTTONSEED											
World	33.76	32.39	33.92	0.98	0.97	0.99	1.01	32.96	31.35	33.67	34.14
United States	4.84	3.86	4.74	1.14	1.10	1.17	1.17	5.50	4.24	5.52	5.52
Total Foreign	28.92	28.53	29.18	0.95	0.95	0.96	0.98	27.46	27.10	28.15	28.62
China	5.53	5.20	5.50	1.27	1.24	1.30	1.38	7.05	6.46	7.14	7.58
India	7.34	7.33	7.70	0.49	0.62	0.55	0.55	3.60	4.54	4.27	4.27
Pakistan	2.51	2.60	2.74	1.14	1.12	1.12	1.16	2.85	2.91	3.06	3.18
USSR	3.43	3.34	3.15	1.61	1.59	1.67	1.67	5.54	5.32	5.25	5.25
Others	10.11	10.06	10.09	0.83	0.78	0.83	0.83	8.42	7.87	8.43	8.35
PEANUTS											
World	19.81	19.65	19.45	1.17	1.11	1.10	1.10	23.18	21.90	21.42	21.40
United States	0.66	0.67	0.73	2.74	2.72	2.24	2.24	1.81	1.81	1.63	1.63
Total Foreign	19.15	18.98	18.72	1.12	1.06	1.06	1.06	21.37	20.09	19.79	19.77
Argentina	0.15	0.18	0.19	1.62	2.06	2.32	2.32	0.24	0.37	0.43	0.43
China	2.91	2.96	3.05	1.95	1.79	1.90	1.90	5.69	5.30	5.80	5.80
India	8.53	8.71	8.10	1.06	0.93	0.90	0.90	9.00	8.09	7.30	7.30
Senegal	0.90	0.78	0.92	0.76	1.04	0.73	0.73	0.69	0.82	0.67	0.67
South Africa	0.15	0.09	0.09	1.07	1.35	1.25	1.40	0.16	0.12	0.10	0.12
Sudan	0.58	0.55	0.54	0.78	0.73	0.60	0.60	0.45	0.40	0.33	0.33
Others	5.92	5.72	5.85	0.87	0.87	0.88	0.88	5.13	5.00	5.17	5.12

CONTINUED

TABLE 6 (Continued)

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Feb.	Mar.	1988/89	1989/90	Feb.	Mar.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SUNFLOWERSEED											
World	14.95	15.94	16.15	1.36	1.38	1.33	1.34	20.37	21.98	21.55	21.67
United States	0.78	0.72	0.75	1.05	1.10	1.38	1.38	0.81	0.80	1.03	1.03
Total Foreign	14.18	15.22	15.40	1.38	1.39	1.33	1.34	19.56	21.18	20.51	20.64
Argentina	2.20	2.80	2.40	1.45	1.36	1.42	1.42	3.20	3.80	3.40	3.40
China	0.83	0.73	0.83	1.42	1.34	1.45	1.45	1.18	0.98	1.20	1.20
EC-12	2.16	2.11	2.55	1.84	1.66	1.60	1.60	3.99	3.50	4.08	4.08
East Europe	1.31	1.29	1.29	1.62	1.87	1.69	1.69	2.13	2.42	2.18	2.18
USSR	4.28	4.46	4.62	1.45	1.59	1.41	1.41	6.20	7.10	6.50	6.50
Others	3.39	3.83	3.71	0.84	0.88	0.85	0.88	2.87	3.39	3.15	3.28
RAPESEED											
World	17.85	17.18	17.88	1.27	1.27	1.38	1.39	22.71	21.89	24.61	24.93
Total Foreign	17.85	17.18	17.88	1.27	1.27	1.38	1.39	22.71	21.89	24.61	24.93
Canada	3.67	2.90	2.63	1.17	1.07	1.26	1.26	4.31	3.10	3.33	3.33
China	4.94	4.99	5.30	1.02	1.09	1.25	1.31	5.04	5.44	6.60	6.93
EC-12	1.84	1.66	1.97	2.81	2.96	2.92	2.92	5.17	4.92	5.72	5.73
East Europe	0.88	1.00	0.94	2.51	2.64	2.38	2.38	2.20	2.64	2.25	2.25
India	4.83	4.99	5.20	0.91	0.83	0.92	0.92	4.38	4.12	4.80	4.80
Others	1.69	1.63	1.85	0.95	1.02	1.03	1.03	1.61	1.67	1.91	1.90
FLAXSEED											
World	3.70	3.65	3.76	0.45	0.51	0.62	0.62	1.67	1.85	2.33	2.33
United States	0.09	0.07	0.10	0.45	0.47	0.95	0.95	0.04	0.03	0.10	0.10
Total Foreign	3.61	3.59	3.66	0.45	0.51	0.61	0.61	1.63	1.82	2.23	2.23
Argentina	0.54	0.58	0.58	0.86	0.90	0.83	0.83	0.46	0.52	0.48	0.48
Canada	0.50	0.60	0.73	0.74	0.83	1.29	1.29	0.37	0.50	0.94	0.94
India	1.20	1.18	1.20	0.30	0.29	0.33	0.33	0.36	0.34	0.40	0.40
USSR	1.04	0.87	0.78	0.21	0.26	0.21	0.21	0.22	0.23	0.17	0.17
Others	0.33	0.36	0.37	0.66	0.66	0.68	0.68	0.22	0.24	0.25	0.25
MAJOR OILSEEDS	*145.93*	*146.83*	*145.92*	*1.35*	*1.40*	*1.43*	*1.43*	*196.44*	*205.75*	*208.64*	*209.00*
United States	29.58	29.41	29.18	1.70	2.01	2.08	2.08	50.31	59.24	60.59	60.59
Total Foreign	116.35	117.42	116.74	1.26	1.25	1.27	1.27	146.13	146.52	148.06	148.42
COPRA	--	--	--	--	--	--	--	4.28	4.77	4.88	4.89
PALM KERNEL	--	--	--	--	--	--	--	2.94	3.34	3.43	3.42
TOTAL OILSEEDS	--	--	--	--	--	--	--	*203.67*	*213.86*	*216.95*	*217.31*
PALM OIL 1/	--	--	--	--	--	--	--	9.57	10.92	11.01	11.09

1/ Not included in total oilseeds.

MARCH 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 7

Cotton Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Feb.	Mar.	1988/89	1989/90	Feb.	Mar.
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	33.8	32.0	33.6	545	545	558	567	84.7	79.9	86.1	87.6
United States	4.8	3.9	4.7	694	688	718	718	15.4	12.2	15.6	15.6
Total Foreign	29.0	28.1	28.9	521	525	531	543	69.3	67.7	70.4	72.0
Maj. Foreign Exporters	13.5	13.1	13.2	749	728	755	779	46.5	43.7	45.8	47.3
Australia	0.2	0.2	0.3	1,475	1,406	1290	1,290	1.3	1.4	1.6	1.6
Central America 1/	0.1	0.1	0.1	830	834	804	807	0.4	0.3	0.3	0.3
China	5.5	5.2	5.5	751	728	764	812	19.1	17.4	19.3	20.5
Egypt	0.4	0.4	0.4	718	683	719	719	1.4	1.3	1.4	1.4
Mexico	0.3	0.2	0.2	1,209	891	913	913	1.4	0.8	0.8	0.8
Pakistan	2.5	2.6	2.7	568	560	556	580	6.5	6.7	7.0	7.3
Sudan	0.3	0.3	0.2	443	454	499	499	0.6	0.6	0.4	0.4
Turkey	0.7	0.7	0.7	882	851	976	976	3.0	2.8	3.0	3.0
USSR	3.4	3.3	3.2	805	805	827	827	12.7	12.3	12.0	12.0
Major Importers 2/	0.4	0.4	0.4	837	889	853	853	1.7	1.5	1.5	1.5
Other Foreign	15.0	14.7	15.3	306	335	330	330	21.1	22.5	23.1	23.1
Argentina	0.5	0.6	0.6	389	486	459	459	0.9	1.3	1.4	1.4
Brazil	2.4	2.2	2.1	311	300	353	353	3.4	3.0	3.4	3.4
India	7.3	7.3	7.7	245	310	277	277	8.3	10.4	9.8	9.8
Syria	0.2	0.2	0.2	667	930	907	907	0.5	0.7	0.7	0.7
Others	4.6	4.4	4.7	377	352	369	369	8.1	7.1	7.9	7.9

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

MARCH 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 8

The table below presents a 9-year record of the difference between the March projections and the final estimates. Using world wheat production as an example, changes between the March projection and the final estimate have averaged 3.2 million tons (0.7 percent) and ranged from -8.0 to 6.9 million tons. The March projection has been below the final 6 times and above the final 3 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 - 1989/90 1/					
	Difference		Lowest	Highest	Below	Above
	Average	Average	Difference		Final	Final
	Percent	---Million Metric Tons---			Number of Years 2/	
WHEAT						
World	0.7	3.2	-8.0	6.9	6	3
U.S.	0.1	0.0	-0.1	0.1	4	1
Foreign	0.8	3.2	-8.0	6.9	6	3
COARSE GRAINS 3/						
World	0.6	4.9	-10.9	4.1	6	3
U.S.	0.1	0.2	-0.2	1.3	5	1
Foreign	0.9	5.1	-10.9	4.2	6	3
RICE (Milled)						
World	1.5	4.6	-10.0	2.3	8	1
U.S.	1.2	0.1	-0.2	0.1	3	1
Foreign	1.5	4.6	-9.9	2.3	8	1
SOYBEANS						
World	1.6	1.5	-2.2	1.4	5	4
U.S.	1.3	0.7	-1.1	1.8	3	5
Foreign	2.6	1.1	-2.2	1.2	7	2
		---Million 480-lb. Bales---				
COTTON						
World	1.1	0.9	-2.9	3.0	4	4
U.S.	0.8	0.1	-0.1	0.3	2	6
Foreign	1.4	0.9	-3.2	2.9	4	5
UNITED STATES		-------Million Bushels-------				
CORN	0.1	6	-8	38	2	1
SORGHUM	0.1	1	0	4	0	2
BARLEY	0.5	2	-3	11	5	1
OATS	0.1	0	-2	0	2	0

1/ The final estimate for 1981/82-1989/90 is defined as the first November estimate following the marketing year.
2/ May not total nine if projection was the same as the final.
3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

March 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

MAP 1

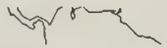
WORLD AGRICULTURAL WEATHER HIGHLIGHTS

MARCH 11, 1991

NOAA/USDA JOINT AGRICULTURAL WEATHER FACILITY

UNITED STATES

Late February and early March precipitation provided badly needed moisture to the west coast States, but caused some flooding in parts of the Delta and southeastern United States. Snow covere increased in the northern Great Plains, but dryness continued across the central Plains Hard Red Winter wheat belt. Moisture continues abundant across much of the Corn Belt.



SOUTH AMERICA

In south-central Brazil, persistent dryness severely stresses corn and soybeans in Rio Grande do Sul. Further north, periodic scattered showers covered northern soybean areas, maintaining favorable moisture conditions. In Argentina, rainfall diminishes over the primary summer crop areas but adequate moisture supplies promote crop development.

EUROPE

Above-normal February rainfall benefits Mediterranean winter grains in the vegetative stage. Below-normal February precipitation in northwestern and eastern Europe limits moisture recharge. Sub-freezing temperatures in early February hurt citrus and vegetables in Greece.

NORTHWESTERN AFRICA

Widespread showers benefit vegetative winter grains in Morocco, Algeria, and Tunisia.

SOUTH AFRICA

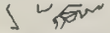
Showers and seasonable temperatures continue until late February, benefiting late-planted, immature corn. Periods of dry, seasonably warm weather the past few weeks benefit crop growth slowed by the recent wet weather.

WESTERN USSR

Winter grains remain dormant. Overwintering conditions continue favorable.

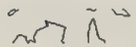
EASTERN ASIA

In southern China, beneficial showers from the Yangtze Valley southward improve conditions for spring plantings. However, more rain is needed along the southern coast for March rice planting. In the north, a cold weather outbreak in late February likely causes only minor damage to winter wheat that broke dormancy earlier than usual.



SOUTHEAST ASIA

Continuing, seasonable showers maintain favorable conditions for Java rice. However, rainfall is sporadic over Malaysia's palm oil regions. Much needed rain covers the eastern Philippines but comes to late for maturing fall grains.



AUSTRALIA

Above normal rainfall soaks the northern half of the country, including Queensland's east coast sugarcane areas. Moisture is generally adequate for immature summer crops.

(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 447-7917.

WEATHER BRIEFS

CHINA: WINTER WEATHER SUMMARY

The winter of 1990/1991 with a few minor exceptions has been favorable in China. The winter wheat region of north China has seen unseasonably mild temperatures for much of the growing season, with seasonably light precipitation. The only cold outbreaks occurred in mid-to-late February, and had little serious impact on crops. In some areas, this cold weather reversed the trend for early breaking of winter grain dormancy and burned back some new growth where dormancy had already been broken. Mild temperatures and well-above-normal precipitation are providing very favorable planting conditions in central China and most of southern China. Precipitation continues to be below normal in the southern coastal rice areas. More rain is needed there for planting early double-crop rice, usually under way in early March.

PHILIPPINES: SEASONAL RAINS WELL BELOW NORMAL

For the second year, the rainy season for the fall-planted crops has failed to develop normally over the eastern Philippines. Production of fall-planted grains has been hurt and rains at this time will not benefit these crops, as harvesting normally begins in mid-February. Heavy rains during February 17 - March 2, 1991, have been of some benefit from southern Luzon to northern Mindanao, improving irrigation reserves for the upcoming main-season crops. However, due to much-below-normal seasonal accumulation, a timely start to the main rainy season is critical for planting of main-season crops.

EUROPE: DRYNESS CONTINUES IN FRANCE AND ROMANIA

Precipitation during winter 1990/1991 continued to be below normal for most of France and Romania, a trend that has continued since summer 1990. During February and early March, 1991, precipitation has been more frequent and widespread in Mediterranean southern Europe than in the north. Precipitation was widespread across Europe during the week of February 10 - 16, 1991, but Romania and most of France received only about 10 millimeters. Significant precipitation will be needed as winter crops break dormancy and summer crop planting begins, or production will again be adversely affected.

PRODUCTION BRIEFS

ARGENTINA: FARM POLICY FRUSTRATION

Frustration with current agricultural policy is mounting among Argentine farmers, according to the U.S. agricultural counselor in Buenos Aires. Farmers face rapid changes in macro-economic policies, exchange rates, and export taxes, combined with a long-term, severe decapitalization of agricultural investment. Traditionally, farmers since World War II have periodically cut back farm output to protest farm policies they did not like, even if it meant economic losses for themselves. Some have recently threatened to strike unless changes are made in current policy. However, rural leaders disagree among themselves over which policies they favor. Small farmers want to return to traditional populist economic policies, with the government providing subsidized credit and low-cost inputs. Large farmers want market forces to determine supply and demand. In response, Argentine government officials have pledged different measures to each group.

Argentina's president recently offered the elimination of export taxes, which would help large farmers, and special credit lines at 16-percent interest to help small farmers. In return, rural associations are expected to pledge their members will pay taxes, especially property and value-added taxes. The president's offer has prompted debate among farm groups because both measures would tend to boost agricultural production. Export taxes range between 5 and 16 percent on most farm commodities, and they reportedly erode profits and capital. Credit is unreliable and expensive because of severe inflation. Farm leaders claim that raising tax revenue has become the government's top priority after a run on the austral (Argentine currency) early this year.

BURMA: RICE PRODUCTION UPDATE

The 1990/91 second season Burmese rice crop has been harvested and, according to the U.S. agricultural attache in Bangkok, total rice production is estimated at 8.4 million tons (milled-basis). On a recent trip to Burma's Pegu division (state), the attache observed that excessive rains during grain fill had depressed yields. However, Burma is still expected to have a sizable crop, nearly 4 percent above last year. The increase is partially attributed to the government offering farmers a competitive domestic paddy price this year.

Burmese officials stated that farmers were encouraged to produce more second crop rice, but producers expressed concern that the harvest will be hurt by the beginning of the rainy season. Officials also mentioned their desire to produce and export more high quality rice, including fragrant rice. In anticipation of increased production, Burma reportedly plans to renovate 120 private mills and construct new ones.

CANADA: FORESTRY SITUATION

The Canadian forest products industry is in a decline. Reduced economic activity and significant reductions in estimated housing starts in both the United States and Canada are expected to lower the 1991 harvest in all regions of Canada. Roundwood production during 1991 is forecast at 175.0 million cubic meters (CUM), 2 percent less than the 1990 timber cut and 12 percent below the record 200.0 million CUM harvested in 1987. Current assessments indicate that the continuing slowdown in the Canadian building trades industry, coupled with weak demand on world markets, will significantly reduce Canada's production of softwood and hardwood logs, as well as the volume of lumber and panel products processed from these logs.

PRODUCTION OF SELECTED PRODUCTS
(1,000 Cubic Meters)

	1989	1990	1991 1/
Roundwood	186,600	178,400	175,000
Softwood Logs	130,000	124,000	121,000
Temperate Hardwood Logs	5,000	4,900	4,600
Poles,Piles,Posts,Pitprops	2,600	2,500	2,400
Softwood Lumber	57,980	55,000	53,500
Temperate Hardwood Lumber	1,245	1,200	1,100
Softwood Veneer	600	575	550
Temperate Hardwood Veneer	725	750	700
Softwood Plywood	2,000	1,930	1,825
Temperate Hardwood Plywood	165	140	130
Fiberboard	826	815	780
Particleboard	3,447	3,300	3,100

1/ Preliminary.

CANADA: FIELD CROP AREA AND OUTPUT FORECAST FOR 1991/92

According to Agriculture Canada, wheat production in 1991/92 is forecast to be 25 percent lower than last year's record crop. Barley, corn, oats, and flaxseed production are also seen lower for next year. Canola output is forecast higher for 1991/92, while soybean production is seen unchanged. It should be noted that these forecasts were made before the Canadian government proposed a new farm support system composed of a Gross Revenue Insurance Plan and a Net Income Stabilization Account program. However, neither measure has yet been enacted by Parliament. The first USDA forecast of 1991/92 Canadian production, supply, and demand for grains will be released in May and for oilseeds in July.

Year	Wheat	Barley	Corn	Oats	Canola	Soybean	Flaxseed
	---------- Million Metric Tons ----------						
1991/92 1/	23.9	12.6	6.6	3.1	3.9	1.3	0.7
1990/91	31.8	13.5	7.0	3.5	3.3	1.3	0.9
1989/90	24.6	11.7	6.4	3.5	3.1	1.2	0.5
	---------- Million Hectares ----------						
1991/92 1/	12.8	4.7	1.1	1.5	3.2	0.5	0.6
1990/91	14.1	4.6	1.0	1.5	2.6	0.5	0.7
1989/90	13.6	4.7	1.0	1.7	2.9	0.5	0.6

1/ Agriculture Canada forecast

CHINA: PRODUCTION ESTIMATES FOR 1990 REPORTED

On February 22, 1991, the Chinese State Statistical Bureau (SSB) released its first agricultural production estimates for 1990. Total agricultural output value stood at 738.2 billion Yuan, up 6.9 percent from last year. Grain production reached a record 435 million tons, surpassing last year's crop by 6.7 percent, while the output of most other crop and livestock products also rose significantly. The gains were attributed to favorable weather and recent efforts by all levels of government to promote agriculture through higher commodity prices, greater investment in science and technology, expansion of irrigated area, and an increase in agricultural inputs.

SSB 1990 Preliminary Statistics--Selected Commodities

Commodity	1990 Output (1000 MM)	Percent Change 1/
Grains 2/	435,000	18.1
Oilseeds 3/	16,150	24.7
Rapeseed	6,930	27.5
Fruits	18,760	2.4
Pork, Beef, Mutton 4/	25,040	7.7
Aquatic products	12,180	5.7

1/ As reported by SSB.
2/ Total grains include soybeans, pulses and tubers.
3/ Excludes soybeans but includes miscellaneous minor oilseeds.
4/ Includes goat meat.

COTE D'IVOIRE: FOOD CROP PRODUCTION ENCOURAGED

Cocoa, coffee, cotton, and rubber are important export crops which generate most of Cote d' Ivoire's export earnings. However, foreign exchange has become scarce because of falling world market prices for these commodities. A severe economic recession has led to an inability to meet internal and external debt obligations and to pay for badly needed food imports. The country continues to import such foods as rice and corn to supplement local production. The Ivorian government, which is actively involved in all facets of the agriculture sector, has begun to focus policies at encouraging food self-sufficiency. Policy goals include: increasing food crops (especially rice) production; developing rural areas; modernizing agricultural activities; assuring favorable guaranteed producer prices; and promoting investment in agriculture. Some of the program's effects may already be evident. Production of paddy rice reached 728,000 tons in 1989/90, up from 691,000 in 1988/89. Favorable weather, area expansion, and increased use of improved seed all contributed to the higher production. However, the 1990/91 rice crop increased only marginally, to 730,000 tons, due to the late arrival of the rainy season, which limited gains. Corn production was a record 520,000 tons in 1989/90, but fell to 460,000 tons in 1990/91 due to the early season dryness.

FRANCE: SUPERIOR QUALITY WHEAT AREA INCREASES

Harvested area of French wheat showed a shift away from feed wheat in 1990/91 (from 28 percent in 1989/90 to 23 percent in 1990/91). Superior quality wheat rose from 27 percent of total plantings in 1989/90 to 31 percent in 1990/91. A new high-yielding superior quality wheat called "sissons" is the primary reason for the shift from feed varieties to superior quality varieties, especially in the Loire Valley. In 1989/90 the "sissons" variety represented only 0.5 percent of total wheat area, but by 1990/91, that percentage had climbed to 6 percent. The U.S. agricultural counselor in Paris estimated that the area planted last fall (for 1991/92 harvest) to superior quality bread-making wheats increased again due to additional area planted to the "sissons" variety.

The French milling industry complained that only 25 percent of the 1990/91 harvest met their variety standards even though the French statistical agency, ONIC, described wheat quality as satisfactory. The most widely grown standard quality wheat variety in France, "thesee," accounted for 22 percent of the 1990/91 harvested area, up 4 percent from last year. Many French millers refused "thesee" this year because of its poor bread-making quality.

GREECE: SNOW AND COLD WEATHER DAMAGE AGRICULTURE

Greek agricultural production was adversely affected by heavy snow and unusually cold temperatures in late January and early February 1991, with the heaviest damage in the northeastern region of the country. Temperatures were reported as low as minus 13 degrees Celsius (8 degrees Fahrenheit). Official reports of damage include: about 40,000 tons of unpicked citrus that was frozen; up to 60 percent of the open air vegetable crop (mainly artichokes and cabbages) lost in some regions although for the country as a whole the percentage was much smaller; up to a million poultry deaths; and several large greenhouse complexes lost. Damage to fruit trees was not assessed, and there were no reports of damage to the winter wheat crop.

PERU: MORE POULTRY PRODUCED IN 1990

Output of poultry meat in Peru totaled 200,000 tons in 1990 up from 185,000 in 1989 but still well below the 250,000 produced in 1988 according to the U.S. agricultural attache in Lima. Continued weakness in the national economy is limiting recovery of demand for poultry meat. Preliminary forecasts for 1991 indicate a small decline in production is likely, as weak demand limits opportunities for profitable production.

SOVIET UNION: HARD CURRENCY GRAIN PURCHASE PROGRAM ENDS

The 2-year-old program through which Soviet producers were paid hard currency for above-quota sales of grain to the state, has come to an end. During the first year, the program resulted in only 267,000 tons of additional sales, rather than the expected 10 million; the amount increased to 752,000 tons during the second year. The program was originally announced in August 1989 in response to criticism that the government was spending enormous amounts of hard currency for grain imports rather than for domestic production. The hard currency earned by the farmers could be used (according to the plan) to purchase foreign agricultural machinery or consumer goods not available for rubles. One of the greatest problems with the program was the low prices actually received by the domestic producers.

TAIWAN: MAJOR CHANGES IN AGRICULTURAL POLICY PROPOSED

Taiwan's Council of Agriculture has drafted an Agriculture Adjustment Plan (1991-1997) which will be considered by the Legislative Yuan for implementation in July 1991. This plan would represent a major change from the past policy of encouraging and stimulating agricultural production to one of recognizing the agricultural sector's limitations while ensuring the security of the domestic food supply. New targets call for zero aggregate growth for Taiwan's agriculture and would result in a decline in agriculture as a percent of GNP. Key features of the plan include land consolidation, stronger conservation and pollution controls, greater reliance on market signals, the establishment of agricultural specialization zones, replacement of agricultural subsidies with direct income payments to farmers, reduced emphasis on rice, sugarcane, and hog production, and possibly a pension program for the aging agricultural labor force. The total cost of the adjustment plan is projected at US$16 billion over 6 years, with a majority of the money targeted for marketing and environmental efforts. Some resistance is expected to many of these changes.

THAILAND: MILK PRODUCTION UP IN 1990

Thailand's milk output in 1990 is estimated at 135,000 tons, up from 118,000 in 1989 according to the U.S. agricultural attache in Bangkok. Growth of 10 to 15 percent is expected again this year as producers respond to strong demand and governmental incentives. One of the primary ways the government encourages increased milk production is to provide low-interest loans for financing cattle imports. About 3,000 dairy animals were imported in 1990.

WORLD: SUGAR PRODUCTION REVISED UPWARD

World 1990/91 centrifugal sugar production is estimated at 110.7 million tons (raw basis), 767,000 more than the January 1991 forecast and 2.3 million above the 108.4 million ton outturn in 1989/90. Among the 1990/91 crop increases since January are: 400,000 tons for Brazil to 7.9 million; 350,000 tons for Turkey to 1.9 million; 313,000 tons for the United States to 6.2 million; and 150,000 tons for Iran to 650,000. Sugar production in the European Community (excluding the former East Germany) for 1990/91 is estimated at 16.0 million tons up 65,000 since the January report. Increases of 100,000 tons for France to 4.7 million and 50,000 tons for Denmark to 590,000 were partially offset by decreases in other member countries. Elsewhere, the most significant single country decrease, since January 1991, occurred in Thailand, down 400,000 tons to 3.3 million. Sugar outturn in the Soviet Union for 1990/91 was revised downward 150,000 tons last month (see WAP-2-91) to 9.1 million.

WORLD CENTRIFUGAL SUGAR PRODUCTION *

1987/88 - 1990/91

	1987/88	1988/89	1989/90	1990/91 JAN.	1990/91 MAR.
	(1,000 Metric Tons)				
NORTH AMERICA	10,418	9,871	9,218	9,235	9,548
SOUTH AMERICA	13,270	13,720	12,702	12,576	12,971
CENTRAL AMERICA	1,687	1,645	1,943	2,125	2,115
CARIBBEAN	8,803	9,436	9,209	8,701	8,695
EC	14,164	14,768	15,286	15,977	16,042
OTHER WEST EUROPE	847	1,037	1,179	1,220	1,220
EAST EUROPE	5,417	4,800	5,635	5,515	5,665
SOVIET UNION	9,560	8,900	9,560	9,300	9,150
NORTH AFRICA	1,794	1,873	1,883	1,931	1,931
OTHER AFRICA	5,906	5,919	5,911	5,900	5,900
MIDDLE EAST	2,408	2,086	2,037	2,106	2,606
OTHER ASIA	25,139	27,394	29,554	31,267	30,817
OCEANIA	3,954	4,073	4,288	4,080	4,040
WORLD	103,367	105,522	108,405	109,933	110,700

* This update of the 1990/91 USDA world sugar production forecast incorporates revisions for only selected countries.

FEATURE COMMODITY ARTICLES

WORLD COCOA PRODUCTION

World cocoa bean production for 1990/91 (October-September) is estimated at 2.4 million tons, 1 percent above the October 1990 forecast, and 1 percent more than harvested in 1989/90. In Cote d'Ivoire, the world's largest producer, 1990/91 outturn was revised upward 30,000 tons from the October forecast to 720,000. This is 10,000 tons more than was harvested in 1989/90. World 1990/91 cocoa production is 43 percent above the 1980/81 - 1984/85 average harvest. This increase has taken place in all regions of the world. The most significant expansion has taken place in Asia, where production has more than tripled since the early 1980's. New cocoa tree plantings, coupled with improved varieties, are the major reason for the increased outturn at the world level.

Africa's 1990/91 cocoa output is forecast at 1.3 million tons, up 1 percent from October, but down 2 percent from last year. In Africa, cocoa production for 1990/91 is forecast up 33 percent from the 5-year 1980/81-84/85 average. In Cote d'Ivoire, the world's largest producer, 1990/91 outturn was revised upward 30,000 tons to 720,000 from the October forecast and is 10,000 tons more than was harvested in 1989/90. Abundant and well-distributed rainfall from September 1990 to January 1991 was cited as contributing to the expected increase. Cote d'Ivoire's outturn in 1990/91, though considerably short of the 1988/89 record of nearly 850,000 tons, will produce one and a half times more cocoa than the 5-year average of the early 1980's. In Ghana, the forecast for 1990/91 is 260,000 tons, 4 percent less than the October number and down 12 percent from last season. Poor rainfall patterns and bad weather resulted in many cherelles wilting and dropping early in the season. Rain did not occur in September and October as expected and unseasonable rains in November and December may have come too late to help some cocoa pods. Ghana is producing 31 percent more cocoa than it was at the onset of the 1980's. In Nigeria, the forecast of 150,000 tons is unchanged from the October forecast, but 3 percent less than last year. The late beginning of rainfall was blamed for the decline from a year ago. However, rainfall in November and December was considerably above that of last year. Consequently, it is expected that the mid crop may be higher than normal. Nigeria is one of the few countries to produce less cocoa than at the onset of the 1980's.

South America's 1990/91 cocoa production is forecast at 565,600 tons, 3 percent more than October and 5 percent above last year. This region has shown a 15 percent increase in production over the 5-year 1980/81-84/85 average. The estimate for Brazil, the world's second largest producer, is 4 percent more than the forecast made in October and up 10 percent over last year. Brazil is producing 13 percent more cocoa than it was during the 5-year period of the early 1980's. The main Bahia crop is estimated at 198,000 tons, the Temporao is 156,000 and production in other states is set at 36,000. In Ecuador, the forecast of 90,000 tons is 2 percent more than the October number, but down 10 percent from last year's revised estimate. The upward revision in the 1989/90 crop was due in part to exceptionally good yields from weather that benefited the cocoa crop with timely rains which were interspersed with dry periods which kept fungus infestation low. Ecuador's cocoa production is 10 percent greater than it was at the beginning of the 1980's.

Central America/Caribbean cocoa production for 1990/91 is forecast at 111,000 tons, unchanged from October, but 3 percent less than the 1989/90 forecast. This region has increased cocoa outturn by 15 percent since the 1980/81 - 1984/85 period. Virtually all of the increase since this 5-year period is accounted for by the Dominican Republic, up 30 percent.

Asia/Oceania cocoa production for 1990/91 is unchanged from the October estimate, but forecast to increase 8 percent over last year. The most pronounced increase over the 5-year period of the early 1980's has taken place in this region. Output has expanded more than 3 times, an increase of over 300,000 tons. In Malaysia, the largest producer in this region, the forecast of 265,000 tons is down 4 percent from the October forecast but up 10 percent from last year. This increase from 1989/90 is attributed to additional trees coming into production which will more than offset the negative effects of reduced fertilizer application, especially in Sabah. Malaysia is producing at a level that is 3.6 times the 1980/85 5-year average of 74,000 tons. The Indonesian forecast of 130,000 tons is 8 percent more than both the October and 1989/90 estimate. Indonesia's cocoa bean production has also exploded in recent years due to substantial increases in area planted to high yielding varieties and more trees in production. Efforts to improve the generally low yield and quality of cocoa appear to be succeeding. This country has expanded the fastest of all major producers. It's cocoa outturn is more than six times the 21,000 ton average of the 5-year period 1980/81-84/85.

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TABLE 9

COCOA BEAN PRODUCTION, SELECTED COUNTRIES 1/
(1,000 Metric Tons)

	Average 1981/85	1988/89	1989/90	Forecast 1990/91 OCT.	1990/91 MAR.
Costa Rica	3.9	4.1	4.2	4.3	4.3
Cuba	2.1	2.1	2.1	2.1	2.1
Dominican Republic	40.0	44.3	57.0	52.0	52.0
Grenada	2.3	2.0	2.0	2.0	2.0
Guatemala	1.8	2.0	2.0	2.0	2.0
Haiti	3.3	3.0	3.0	3.0	3.0
Honduras	0.8	2.1	2.2	2.2	2.2
Jamaica & Dep	2.3	1.5	1.5	2.0	2.0
Mexico	36.4	41.0	38.5	39.0	39.0
Nicaragua	0.2	0.2	0.2	0.2	0.2
Panama	0.7	0.5	0.5	0.5	0.5
Trinidad and Tobago	2.1	1.4	1.5	1.5	1.5
Other 2/	0.2	0.1	0.1	0.1	0.1
NORTH AND CENTRAL AMERICA AND CARIBBEAN	96.1	104.4	114.9	111.0	111.0
Bolivia	2.7	2.5	2.5	2.5	2.5
Brazil	345.8	334.0	355.0	375.0	390.0
Colombia	39.4	56.3	58.0	60.0	60.0
Ecuador	82.1	82.0	100.0	88.0	90.0
Peru	9.3	10.0	10.0	10.0	10.0
Surinam	0.1	0.1	0.1	0.1	0.1
Venezuela	13.3	11.5	13.0	13.0	13.0
SOUTH AMERICA	492.7	496.4	538.6	548.6	565.6
Angola	0.2	0.2	0.2	0.2	0.2
Cameroon	114.9	124.0	117.0	120.0	120.0
Comoro Islands	0.1	0.1	0.1	0.1	0.1
Congo	1.8	1.6	1.0	1.0	1.0
Cote d' Ivoire 3/	443.7	848.9	710.0	690.0	720.0
Equatorial Guinea	8.6	6.6	7.5	8.0	7.5
Gabon	2.3	1.9	1.8	1.8	1.8
Ghana	199.2	301.0	295.0	270.0	260.0
Liberia	5.6	3.0	3.0	2.0	2.0
Madagascar	2.1	2.8	2.5	2.5	2.5
Nigeria 4/	159.6	160.0	155.0	150.0	150.0
Sao Tome and Principe	4.7	4.3	4.0	4.0	4.0
Sierra Leone	9.7	7.6	8.0	8.0	8.0
Tanzania	1.3	1.9	1.5	1.5	1.5
Togo 3/	12.9	10.0	9.5	10.0	9.0
Uganda	0.2	0.3	0.3	0.3	0.3
Zaire	4.7	4.6	5.0	5.0	5.0
AFRICA	971.6	1,478.8	1,321.4	1,274.4	1,292.9
Fiji	0.2	0.3	0.3	0.3	0.3
India	4.1	6.0	6.0	6.0	6.0
Indonesia	21.1	98.0	120.0	120.0	130.0
Malaysia	73.6	225.0	240.0	275.0	265.0
Papua New Guinea	28.7	48.0	40.0	40.0	40.0
Philippines	5.3	7.8	9.0	9.0	9.0
Solomon Islands	0.9	2.6	2.7	3.0	3.0
Sri Lanka	1.5	1.5	1.5	1.5	1.5
Vanuatu/New Hebrides	0.8	1.4	1.0	1.0	1.0
Western Samoa	1.0	0.5	0.5	0.5	0.5
ASIA AND OCEANIA	137.3	391.1	421.0	456.3	456.3
WORLD	1,697.8	2,470.7	2,395.9	2,390.3	2,425.8

1/Estimates refer to an October-September crop year. 2/Includes Dominica, St. Lucia, Guadeloupe, and Martinique. 3/ Includes some cocoa marketed from Ghana. 4/ Includes cocoa marketed through Benin.

MARCH 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION FAS, USDA

WORLD LIVESTOCK AND MEAT PRODUCTION

World red meat production for 1991 is forecast at 120.2 million tons, one percent above 1990. Beef production is forecast at 47.9 million tons, up 2.3 million since September and 0.2 million above 1990. Much of the increase since September is due to a revised data series for Brazil. Pork production is estimated at 66.0 million tons, up 1.8 million since September and 1 million tons above 1990. Sheep and goat meat production is projected at 6.3 million tons, no change from September and 79,000 above the 1990 level. Beginning 1991 cattle numbers are estimated at 1,061 million head, up 17 million from September but 186,000 head below 1990. Again, the major change since September is the revised data series for Brazil. Hog numbers are up 13 million head from September to 779 million and 16 million above 1990. Sheep (including goats in China) are down 41 million head from September to 882 million and 13 million below 1990.

World Red Meat Production
(Million tons)

	1988	1989	1990	Sept. 1991	Mar. 1991
Beef and Veal 1/	46.9	47.6	47.7	45.6	47.9
Pork	63.0	63.9	65.0	64.2	66.0
Sheep and Goat meat	5.7	6.0	6.2	6.3	6.3
Total	115.6	117.5	118.9	116.1	120.2

1/ Historical series for Brazil revised upward.

The 1991 beef and veal production forecast for the United States is about 10.6 million tons, little changed from September. Canadian production for 1991 is forecast below the September estimate, and now shows a small year-over-year decline. Reduced cattle slaughter in 1990 and 1991 reflect the decline in the beef industry in Eastern Canada. More beef cattle from western areas are being exported to the United States. Meanwhile, U.S. beef exports to Eastern Canada have increased. In Mexico, beef production is projected down 10 percent due to a drop in slaughter as improved pasture conditions are expected to permit herd rebuilding this year after 3 years of drought.

Argentina's 1991 beef production was revised up 4 percent from September but remains 3 percent below revised 1990 production levels. Production for 1990 was revised upward 6 percent because farmers were forced to increase slaughter to increase cash flow to pay taxes and farm costs. Slaughter is expected to slow in 1991 because of reduced beef exports to the EC and financial problems in Argentine slaughter plants. Herd reduction and increased slaughter in EC countries is expected to continue and 1991 projections are up over 2 percent. In China, the cattle herd is not growing as rapidly as forecast earlier but a 1.7 million head increase over 1990 is expected. The 1991 Australian beef production estimate has been revised upward 4 percent.

Pork production during 1991 in the countries reviewed is expected to be almost 3 percent higher than estimated in September and up over one percent from last year. Production in the United States is down almost two percent from the September estimate, reflecting a slower growth in breeding inventories than previously forecast. In China, hog inventories for the start of 1991 were up almost 4 percent from the September estimate and 2 percent above 1990. The Chinese pork production estimate for 1991 has been increased almost 7 percent over the September estimate and now shows more than a 3 percent increase from the revised 1990 output. Expanded grain production from the 1990/91 crop is expected to support this stronger growth in pork production. The level of EC pork production for both 1990 and 1991 has been increased from the September estimates. Most of the increase comes from higher production in Germany and the Netherlands. Unfavorable economic conditions in Yugoslavia have reduced both starting 1991 inventories and production prospects. In Romania, starting inventories are up 2 percent from September estimates due to greatly expanded private hog herds. In Poland, increased grain and potato production have helped improve hog-feed ratios and this likely will help boost 1991 production about 2 percent. Despite falling hog prices, hog numbers in Taiwan were 7 percent larger than estimated in September. Projected 1991 pork production has been increased over 4 percent from September's estimate and it now shows a small rise from the 1990 level. In contrast, weak prices in Korea during 1989 had more impact on pork production than earlier thought. Expected pork production for both 1990 and 1991 has been reduced about 15 percent. Small farmers do not seem to be rebuilding their herds as expected. Pending implementation of animal waste regulations, due in 1992, could also have slowed herd growth on larger farmer.

Sheep meat production for 1991 in the countries reviewed is up one percent from the projected September and 1990 levels. Current production forecasts for Australia and New Zealand are up from those of September, with both countries starting 1991 with sheep numbers down from the 1990 level. In Australia, the weak wool market, with stocks equal to about one year's clip, has forced a 6 percent cut in inventory from projected September estimates. More sheep are being slaughtered causing a 3-percent upward revision in sheepmeat production projection for 1991. New Zealand started the year with very good pasture conditions. Sheep numbers are forecast to fall slightly faster than earlier projections because of increased lamb slaughter and reduced breeding. Better markets for beef, low wool prices, and high wool stocks (wool stocks are about 25 percent of yearly clip) are contributing to the sheep flock reduction. In China, sheep and goat numbers are down 11 percent from September estimates.

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TABLE 10

CATTLE AND BUFFALO INVENTORIES 1/
(THOUSAND HEAD JANUARY 1)

SELECTED PRODUCERS	1988	1989	1990 2/	Forecast Sept.	1991 March
CANADA	10,863	11,016	11,201	11,350	11,350
MEXICO	35,378	34,999	31,747	30,046	30,005
UNITED STATES	99,622	98,065	98,162	101,006	99,436
EL SALVADOR	1,101	1,162	1,176	1,214	1,214
ARGENTINA	50,782	50,782	50,582	50,782	50,182
BRAZIL 3/	126,163	128,055	129,975	101,330	131,924
URUGUAY	10,306	10,548	9,377	9,481	9,431
BELGIUM/LUXEMBOURG	3,159	3,174	3,277	3,300	3,430
DENMARK	2,323	2,226	2,232	2,220	2,241
FRANCE	21,052	20,120	19,980	19,830	19,830
GERMANY, FED. REP.	14,887	14,659	14,563	14,568	14,587
IRELAND	5,580	5,637	5,899	6,124	6,000
ITALY	8,898	8,843	8,853	8,769	8,659
NETHERLANDS	4,546	4,606	4,731	4,720	4,800
PORTUGAL	1,332	1,359	1,330	1,316	1,271
SPAIN	5,094	5,200	5,331	5,275	5,300
UNITED KINGDOM	11,849	11,902	11,933	12,143	12,004
BULGARIA	1,649	1,613	1,550	1,497	1,497
GERMANY, DEM. REP.	5,721	5,710	5,724	5,675	4,927
POLAND	10,200	10,100	10,143	9,947	9,023
ROMANIA	7,182	6,416	6,283	6,450	5,952
YUGOSLAVIA	4,881	4,759	4,702	4,667	4,670
U.S.S.R.	120,592	119,580	118,300	117,500	117,500
CHINA	94,650	97,950	100,752	111,484	102,500
KOREA, SOUTH	2,386	2,039	2,051	2,088	2,100
JAPAN	4,667	4,682	4,760	4,880	4,865
TAIWAN	172	176	165	168	164
AUSTRALIA	23,469	23,938	24,230	24,952	24,277
NEW ZEALAND	7,999	8,058	7,830	7,866	8,070
SUBTOTAL	696,503	697,374	696,839	680,648	697,209
OTHERS 4/	359,052	362,471	363,939	363,383	363,383
WORLD	1,055,555	1,059,845	1,060,778	1,044,031	1,060,592

1/ This is the semiannual update of the production series regularly published in the World Agricultural Production and World Livestock Situation circulars. World totals compare to those in the above mentioned circulars. 2/ Preliminary. 3/ Historical series revised upward; not comparable to previous estimates. 4/ Countries with no revisions since the September release.

MARCH 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 11

BEEF AND VEAL PRODUCTION 1/
(1,000 METRIC TONS CARCASS-WEIGHT-EQUIVALENT)

SELECTED PRODUCERS	1988	1989	1990 2/	Forecast Sept.	1991 March
CANADA	973	980	922	975	918
MEXICO	1,754	2,140	1,790	1,842	1,670
UNITED STATES	10,880	10,633	10,463	10,604	10,635
EL SALVADOR	23	27	28	29	29
ARGENTINA	2,610	2,600	2,650	2,490	2,580
BRAZIL 3/	4,104	4,287	4,180	2,280	4,291
URUGUAY	321	376	349	315	315
BELGIUM/LUXEMBOURG	323	312	326	330	330
DENMARK	217	205	200	200	202
FRANCE	1,780	1,670	1,710	1,720	1,720
GERMANY, FED. REP.	1,609	1,576	1,793	1,620	1,720
IRELAND	458	432	500	507	522
ITALY	1,164	1,140	1,180	1,130	1,165
NETHERLANDS	506	485	540	465	495
SPAIN	450	451	450	450	460
UNITED KINGDOM	945	980	997	1,018	1,023
BULGARIA	131	136	137	126	126
GERMANY, DEM. REP.	369	367	329	410	330
POLAND	783	729	799	726	726
YUGOSLAVIA	301	309	302	300	301
U.S.S.R.	8,600	8,800	8,700	8,700	8,700
CHINA	958	1,072	1,250	1,250	1,400
KOREA, SOUTH	175	124	122	118	118
JAPAN	570	548	545	560	557
TAIWAN	5	6	5	6	5
AUSTRALIA	1,533	1,565	1,695	1,626	1,691
NEW ZEALAND	562	550	470	430	494
SUBTOTAL	42,104	42,500	42,432	40,227	42,523
OTHERS 4/	4,808	5,142	5,301	5,404	5,404
WORLD	46,912	47,642	47,733	45,631	47,927

1/ This is the semiannual update of the production series regularly published in the World Agricultural Production and World Livestock Situation circulars. World totals compare to those in the above mentioned circulars. 2/ Preliminary. 3/ Historial series revised upward; not comparable to previous estimates. 4/ Countries with no revisions since the September release.

MARCH 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 12

HOG INVENTORIES 1/
(THOUSAND HEAD JANUARY 1)

SELECTED PRODUCERS	1988	1989	1990 2/	Forecast Sept.	1991 March
CANADA	10,748	11,018	10,756	10,600	10,800
MEXICO	10,879	9,003	8,563	8,593	8,593
UNITED STATES	54,384	55,469	53,852	55,300	54,562
BRAZIL	31,700	31,700	37,500	44,675	44,675
BELGIUM/LUXEMBOURG	5,958	6,306	6,551	6,200	6,715
DENMARK	9,048	9,105	9,120	9,300	9,282
FRANCE	11,915	11,866	11,860	11,860	11,930
GERMANY, FED. REP.	23,670	22,589	22,165	22,240	21,980
IRELAND	960	961	995	1,000	1,000
ITALY	9,383	9,360	9,261	9,210	9,520
NETHERLANDS	14,226	13,820	13,634	13,500	13,800
SPAIN	16,941	16,100	16,910	17,000	17,000
UNITED KINGDOM	7,915	7,626	7,383	7,178	7,494
BULGARIA	4,034	4,134	4,270	4,288	4,288
GERMANY, DEM. REP.	12,503	12,646	12,013	10,323	8,742
POLAND	19,373	20,169	18,685	19,700	19,736
ROMANIA	15,224	14,350	11,659	13,600	13,929
YUGOSLAVIA	8,324	7,396	7,231	7,450	7,100
U.S.S.R.	77,403	78,143	78,900	79,000	79,000
CHINA	327,730	342,220	352,810	346,560	360,000
KOREA, SOUTH	4,281	4,852	4,801	5,000	4,528
JAPAN	11,725	11,866	11,816	11,480	11,495
TAIWAN	7,129	6,954	7,783	8,000	8,570
AUSTRALIA	2,719	2,766	2,765	2,850	2,850
NEW ZEALAND	426	414	380	355	355
SUBTOTAL	698,598	710,833	721,663	725,262	737,944
OTHERS 3/	43,135	43,222	41,645	41,454	41,454
WORLD	741,733	754,055	763,308	766,716	779,398

1/ This is the semiannual update of the production series regularly published in the World Agricultural Production and World Livestock Situation circulars. World totals compare to those in the above mentioned circulars. 2/ Preliminary. 3/ Countries with no revisions since the September release.

MARCH 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 13

PORK PRODUCTION 1/
(1,000 METRIC TONS CARCASS-WEIGHT-EQUIVALENT)

SELECTED PRODUCERS	1988	1989	1990 2/	Forecast Sept.	1991 March
CANADA	1,188	1,184	1,140	1,155	1,155
MEXICO	964	910	792	800	820
UNITED STATES	7,114	7,173	6,960	7,214	7,112
BRAZIL	1,100	950	1,050	1,100	1,100
BELGIUM/LUXEMBOURG	813	831	759	797	810
DENMARK	1,168	1,165	1,200	1,225	1,218
FRANCE	1,804	1,840	1,870	1,880	1,880
GERMANY, FED. REP.	3,342	3,161	3,379	2,730	2,987
IRELAND	148	144	155	158	167
ITALY	1,269	1,295	1,280	1,290	1,310
NETHERLANDS	1,632	1,636	1,672	1,600	1,670
SPAIN	1,722	1,722	1,738	1,780	1,800
UNITED KINGDOM	1,048	978	980	1,000	1,022
BULGARIA	404	424	422	400	400
GERMANY, DEM. REP.	1,321	1,317	1,108	1,100	1,100
POLAND	1,845	1,870	1,814	1,873	1,910
YUGOSLAVIA	819	791	771	800	785
U.S.S.R.	6,600	6,700	6,800	6,800	6,800
CHINA	20,176	21,228	22,700	22,000	23,500
HONG KONG	34	30	23	27	23
KOREA, SOUTH	433	485	440	554	460
JAPAN	1,578	1,594	1,560	1,560	1,535
TAIWAN	911	917	1,000	935	1,010
AUSTRALIA	298	302	305	309	309
NEW ZEALAND	43	44	43	41	41
SUBTOTAL	57,774	58,691	59,961	59,128	60,924
OTHERS 3/	5,206	5,161	5,060	5,045	5,045
WORLD	62,980	63,852	65,021	64,173	65,969

1/ This is the semiannual update of the production series regularly published in the World Agricultural Production and World Livestock Situation circulars. World totals compare to those in the above mentioned circulars. 2/ Preliminary. 3/ Countries with no revisions since the September release.

MARCH 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 14

SHEEP INVENTORIES 1/
(THOUSAND HEAD JANUARY 1)

SELECTED PRODUCERS	1988	1989	1990 2/	Forecast Sept.	1991 March
UNITED STATES	10,945	10,858	11,363	11,500	11,200
ARGENTINA	29,202	29,345	28,571	26,876	26,726
URUGUAY	27,365	28,420	28,420	28,420	28,420
BELGIUM/LUXEMBOURG	160	156	161	163	163
DENMARK	73	86	100	120	120
FRANCE	10,360	11,500	11,500	11,550	11,550
GERMANY, FED. REP.	1,414	1,464	1,533	1,531	1,531
IRELAND	4,301	4,991	5,834	5,775	6,175
ITALY	11,457	11,623	11,695	11,735	11,645
NETHERLANDS	1,169	1,405	1,702	1,550	1,800
SPAIN	20,310	23,797	25,447	27,400	27,000
UNITED KINGDOM	27,820	29,045	29,521	30,691	30,377
BULGARIA	8,886	8,609	7,797	7,118	7,118
GERMANY, DEM. REP.	2,656	2,634	2,603	2,443	2,060
POLAND	4,075	4,300	4,196	4,100	3,900
ROMANIA	18,900	16,210	15,442	16,500	15,038
YUGOSLAVIA	7,824	7,564	7,596	7,650	7,499
U.S.S.R.	140,783	140,684	140,500	138,500	138,500
CHINA 3/	180,340	201,530	211,642	235,986	210,000
AUSTRALIA	162,500	171,292	177,841	186,709	174,174
NEW ZEALAND	64,244	64,600	60,569	58,335	58,175
SUBTOTAL	734,784	770,113	784,033	814,652	773,171
OTHERS 4/	114,444	111,486	110,447	108,802	108,802
WORLD	849,228	881,599	894,480	923,454	881,973

1/ This is the semiannual update of the production series regularly published in the World Agricultural Production and World Livestock Situation circulars. World totals compare to those in the above mentioned circulars. 2/ Preliminary. 3/ Includes Goats in China. 4/ Countries with no revisions since the September release.

MARCH 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 15

LAMB, MUTTON, GOAT MEAT PRODUCTION 1/
(1,000 METRIC TONS CARCASS-WEIGHT-EQUIVALENT)

SELECTED PRODUCERS	1988	1989	1990 2/	Forecast Sept.	March
MEXICO	73	75	76	78	78
UNITED STATES	152	157	165	167	166
ARGENTINA	87	96	100	107	105
URUGUAY	73	74	74	74	74
BELGIUM/LUXEMBOURG	7	7	7	7	7
DENMARK	1	2	2	2	2
FRANCE	153	160	160	160	160
GERMANY, FED. REP.	30	31	33	34	34
IRELAND	49	63	86	93	95
ITALY	76	80	83	81	83
NETHERLANDS	12	13	14	14	15
SPAIN	231	231	240	275	250
UNITED KINGDOM	321	368	371	370	380
BULGARIA	89	78	77	70	70
GERMANY, DEM. REP.	19	18	8	9	7
POLAND	25	22	28	20	20
YUGOSLAVIA	70	69	69	64	67
U.S.S.R.	1000	1000	1000	1000	1000
CHINA	802	962	1090	1050	1100
KOREA, SOUTH	1	1	1	1	1
AUSTRALIA	549	585	666	681	699
NEW ZEALAND	576	574	499	515	522
SUBTOTAL	4,396	4,666	4,849	4,872	4,935
OTHERS 3/	1,338	1,370	1,386	1,379	1,379
WORLD	5,734	6,036	6,235	6,251	6,314

1/ This is the semiannual update of the production series regularly published in the World Agricultural Production and World Livestock Situation circulars. World totals compare to those in the above mentioned circulars. 2/ Preliminary. 3/ Countries with no revisions since the September release.

MARCH 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

WORLD SOYBEAN PRODUCTION

Global soybean production in 1990/91 is forecast at 104.5 million tons, down by 2.2 million or 2 percent from 1989/90, but 9 percent above the 1988/89 crop. The soybean area, yield, and production estimates for 1974/75 through 1990/91 are provided in the accompanying tables.

The 1990/91 soybean harvest was down only marginally for the United States. Brazilian production is expected to have a large decline this season, with an estimated 15-percent decrease from 1989/90, down 3.0 million tons. Hampered not only by economic problems, including producer credit shortages, on-going high inflation, and a poor exchange rate, persistent dry conditions in the southern growing region of Brazil have greatly reduced yield potential. This is particularly true in the largest soybean growing state of Brazil, Rio Grande Do Sul, which has suffered the most from the dry weather. Excellent rainfall in the center-west States, including Mato Grosso and parts of Mato Grosso Do Sul, has provided favorable growing conditions for an excellent crop. While significant area reductions have been made in the center-west soybean regions, above average yields are expected to help bolster Brazil's overall output.

Argentina also is expected to harvest a smaller 1990/91 soybean crop. Both area and yield are estimated below last year's level. Southern hemisphere soybean estimates could still be affected by weather until the end of May.

Rod Paschal, Oilseed Chairperson (202) 382-8881

WORLD SOYBEAN HARVESTED AREA

	74/75	75/76	76/77	77/78	78/79	79/80	80/81	81/82	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91F
AREA HARVESTED (1,000 hectares)																	
United States	20,777	21,698	19,992	23,403	25,764	28,467	27,443	26,776	28,102	25,303	26,755	24,929	23,598	23,137	23,218	24,094	22,866
Brazil	5,824	6,417	7,070	7,782	8,256	8,774	8,501	8,202	8,136	9,421	10,153	9,450	9,270	10,524	12,170	11,400	9,900
China	7,261	6,999	6,691	6,850	7,144	7,247	7,226	8,024	8,419	7,567	7,286	7,718	8,295	8,411	8,120	8,057	7,629
Argentina	356	434	660	1,250	1,600	2,030	1,740	1,986	2,281	2,910	3,270	3,316	3,510	4,260	4,000	4,950	4,900
India	90	100	200	225	275	400	392	622	770	836	1,243	1,340	1,527	1,543	1,734	2,134	2,200
Indonesia	752	646	646	733	784	732	810	608	640	859	896	970	920	950	1,177	1,150	1,250
Paraguay	151	173	229	272	360	400	400	420	350	420	550	550	530	615	850	980	980
Soviet Union	822	811	762	786	815	838	854	864	876	842	772	738	745	783	760	830	835
Italy	--	--	--	--	--	--	--	3	3	25	36	94	232	481	432	453	515
Canada	168	158	153	223	285	279	277	279	364	364	405	405	384	461	533	540	504
Thailand	132	118	94	131	145	100	105	125	101	156	193	241	282	303	392	502	375
Romania	238	121	156	171	202	302	364	310	269	275	292	319	312	350	340	360	360
Korea, DPR	390	395	400	300	300	300	300	300	300	300	320	330	335	340	340	340	340
Mexico	255	312	170	300	215	380	150	370	350	350	350	370	340	390	139	468	276
Bolivia	6	12	8	19	28	38	27	49	33	50	63	66	69	83	144	173	195
South Korea	286	274	247	251	247	207	188	202	183	182	190	156	133	154	145	157	152
Japan	93	87	83	79	127	130	142	149	147	143	134	134	138	163	162	152	146
Turkey	4	6	6	5	3	3	3	17	24	24	28	45	60	112	60	100	140
Vietnam	29	37	41	43	36	49	75	104	97	89	120	130	135	135	150	150	140
Colombia	88	38	57	69	71	79	44	49	60	51	54	74	65	61	93	112	120
France	1	2	1	3	4	17	8	9	9	12	22	28	48	79	92	135	116
Yugoslavia	9	15	31	32	34	31	17	48	77	107	114	101	96	105	110	88	93
South Africa	24	22	25	25	26	28	22	22	30	35	23	30	40	44	44	61	87
Nigeria	170	170	180	190	190	195	165	100	100	100	100	115	100	44	55	68	75
Zimbabwe	18	25	24	35	45	51	38	60	61	56	44	45	59	65	71	68	70
Ecuador	2	7	11	15	16	21	21	21	20	5	25	32	47	55	62	65	62
Egypt	2	4	7	14	34	42	35	46	60	67	46	46	50	50	50	39	50
Iran	30	54	57	42	67	58	45	50	55	51	50	50	50	50	50	50	50
Hungary	15	25	39	29	19	20	20	24	24	30	30	24	23	36	66	54	45
Australia	46	26	35	50	54	57	40	41	48	48	63	71	66	46	71	56	42
Bulgaria	27	36	56	69	99	96	94	94	69	64	72	71	51	36	40	40	40
Uruguay	14	8	11	22	35	35	35	22	9	8	14	25	43	43	50	43	39
Zambia	--	--	--	--	2	4	5	5	5	9	10	14	21	26	32	38	38
Burma	22	23	25	24	23	23	25	28	29	28	30	30	32	34	36	35	35
Spain	25	8	4	4	9	9	7	4	3	1	2	2	1	2	7	11	17
Syria	--	--	--	--	--	--	--	--	--	--	--	--	--	--	10	13	15
Philippines	8	11	10	9	8	10	10	11	9	8	7	7	8	9	10	12	15
Sri Lanka	--	--	--	--	--	--	--	--	--	--	--	--	--	3	8	8	8
Guatemala	--	--	--	--	--	--	--	1	1	3	5	5	14	12	13	13	8
Greece	--	--	--	--	--	--	--	--	--	--	--	--	1	2	3	8	7
Austria	--	--	--	--	--	--	--	--	--	--	--	--	--	--	6	5	5
Others 1/	47	44	37	34	27	28	19	20	15	13	18	18	23	21	21	19	27
TOTAL	38,182	39,316	38,218	43,489	47,349	51,480	49,647	50,065	52,129	50,812	53,785	52,089	51,653	54,018	55,866	58,031	54,767

1/ Other soybean producers include those with less than 10,000 tons production in 1990/91.

MARCH 1991

Production Estimates & Crop Assessment Division, FAS, USDA

WORLD SOYBEAN YIELDS

	74/75	75/76	76/77	77/78	78/79	79/80	80/81	81/82	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91F
YIELD (metric tons per hectare)																	
Italy	--	--	--	--	--	--	--	3.00	3.00	2.48	3.06	3.04	3.47	3.30	3.26	3.53	2.99
Canada	1.79	2.32	1.63	2.60	1.81	2.36	2.49	2.18	2.33	2.02	2.26	2.50	2.50	2.76	2.16	2.26	2.63
Greece	--	--	--	--	--	--	--	--	--	--	--	--	3.00	2.00	2.00	3.25	2.57
Spain	1.56	1.75	1.50	2.00	1.89	1.67	2.00	1.50	1.67	2.00	2.00	2.50	2.00	2.00	1.86	2.46	2.53
Egypt	1.00	1.25	1.57	1.93	2.32	2.52	2.63	2.83	2.77	2.42	3.11	2.89	2.80	2.80	2.60	2.56	2.50
United States	1.59	1.94	1.75	2.06	1.97	2.16	1.78	2.02	2.12	1.76	1.89	2.29	2.24	2.28	1.82	2.17	2.29
France	4.00	1.00	2.00	1.33	1.00	0.94	1.75	2.00	1.78	2.08	1.41	1.64	1.77	2.35	2.48	2.13	2.13
Guatemala	--	--	--	--	--	--	--	1.00	2.00	1.00	1.80	1.80	2.07	2.17	2.15	2.31	2.13
Argentina	1.36	1.60	2.12	2.16	2.31	1.77	2.01	2.09	1.84	2.41	2.06	2.20	1.99	2.28	1.63	2.17	2.10
Hungary	2.00	1.52	1.08	1.41	1.42	1.75	1.85	1.79	2.25	1.73	1.67	1.92	2.22	1.81	1.58	2.15	2.00
Austria	--	--	--	--	--	--	--	--	--	--	--	--	--	--	2.00	2.00	2.00
Bolivia	2.00	1.25	1.38	1.37	1.46	1.26	1.48	1.76	1.58	1.56	1.57	2.23	1.59	1.70	2.04	1.33	2.00
Colombia	1.92	1.97	1.81	1.90	2.06	1.95	2.02	2.02	2.03	1.84	1.93	2.08	1.97	1.89	1.90	1.89	1.93
Iran	0.60	1.30	1.79	2.05	1.69	1.64	2.67	2.50	2.36	1.88	1.80	1.80	1.80	1.80	1.80	1.80	1.80
Zimbabwe	1.56	1.80	1.83	2.00	1.87	1.75	1.74	1.48	1.30	1.61	1.96	1.87	1.83	1.83	1.70	1.60	1.74
Ecuador	1.50	1.14	1.27	1.27	1.44	1.43	1.48	1.67	1.75	1.20	1.84	1.78	1.81	1.67	1.65	1.66	1.73
South Africa	0.83	0.82	1.12	1.48	1.00	1.43	1.18	0.96	0.87	0.91	1.52	1.17	1.58	1.91	1.59	1.80	1.72
Mexico	1.65	2.00	1.65	1.57	1.54	1.79	1.87	1.84	1.57	1.71	1.57	1.92	1.94	1.92	2.16	2.10	1.72
Brazil	1.70	1.75	1.77	1.23	1.24	1.73	1.79	1.57	1.81	1.65	1.80	1.49	1.87	1.71	1.91	1.75	1.72
Australia	1.61	1.73	1.57	1.54	1.83	1.44	1.83	1.88	1.10	1.85	1.75	1.48	1.74	1.63	1.59	1.61	1.71
Syria	--	--	--	--	--	--	--	--	--	--	--	--	--	--	1.60	1.54	1.67
Paraguay	1.46	1.64	1.65	1.22	1.53	1.44	1.50	1.43	1.49	1.31	1.73	1.09	1.79	1.79	1.90	1.53	1.63
Yugoslavia	1.56	2.00	1.55	2.09	1.85	2.16	2.00	1.92	2.57	1.96	2.00	1.72	2.34	2.26	1.64	2.38	1.56
South Korea	1.12	1.14	1.19	1.27	1.19	1.24	1.15	1.27	1.27	1.24	1.34	1.50	1.50	1.32	1.65	1.61	1.53
Japan	1.43	1.45	1.33	1.41	1.50	1.48	1.23	1.42	1.54	1.52	1.78	1.70	1.78	1.76	1.71	1.79	1.51
China	1.03	1.03	0.99	1.06	1.06	1.03	1.10	1.16	1.07	1.29	1.33	1.36	1.40	1.48	1.43	1.27	1.51
Uruguay	1.07	1.13	1.09	1.36	1.00	1.29	1.29	1.14	1.33	1.25	1.50	1.80	1.86	1.63	1.10	1.28	1.49
Korea, DPR	0.72	0.73	0.75	1.03	1.07	1.10	1.10	1.10	1.10	1.13	1.25	1.29	1.30	1.29	1.29	1.29	1.29
Turkey	2.25	1.17	1.33	1.20	1.00	1.00	0.67	0.88	1.50	1.92	2.14	1.67	2.00	1.07	1.17	1.20	1.29
Thailand	0.83	0.97	1.21	0.73	1.10	1.02	0.95	1.06	1.12	1.15	1.28	1.28	1.26	1.12	1.32	1.34	1.28
Sri Lanka	--	--	--	--	--	--	--	--	--	--	--	--	--	0.67	1.25	1.25	1.25
Romania	1.25	1.76	1.37	1.12	1.14	1.27	1.23	0.87	1.12	0.94	1.39	0.99	1.51	1.00	1.00	1.25	1.19
Zambia	--	--	--	--	0.50	1.00	0.80	1.40	1.60	1.44	1.50	1.21	1.05	1.23	1.06	0.95	1.16
Soviet Union	0.44	0.96	0.63	0.69	0.78	0.56	0.62	0.57	0.61	0.67	0.61	0.63	0.94	0.91	1.16	1.15	1.10
Bulgaria	1.22	2.22	1.77	1.30	1.21	1.64	1.14	1.20	1.68	1.28	1.00	0.55	1.06	0.94	1.00	1.00	1.00
Indonesia	0.79	0.81	0.81	0.84	0.87	0.89	0.87	0.86	0.84	0.90	0.97	0.98	0.98	1.00	1.02	0.96	0.96
India	0.39	0.70	0.75	0.80	0.80	0.88	1.13	0.75	0.64	0.73	0.77	0.76	0.58	0.58	0.89	0.80	0.96
Nigeria	0.38	0.38	0.39	0.37	0.38	0.39	0.33	0.60	0.65	0.50	0.60	0.48	0.70	0.91	1.00	0.88	0.87
Philippines	0.75	0.73	0.80	0.78	1.00	0.90	1.00	1.00	0.89	1.00	1.00	0.86	0.88	0.78	0.80	0.83	0.80
Vietnam	0.52	0.60	0.49	0.56	0.56	0.65	0.75	0.73	0.66	0.75	0.72	0.69	0.70	0.70	0.80	0.80	0.75
Burma	0.59	0.52	0.64	0.67	0.70	0.65	0.68	0.68	0.69	0.79	0.77	0.77	0.84	0.79	0.78	0.80	0.57
Others 1/	1.53	1.45	1.65	1.68	1.67	1.50	1.63	1.45	1.40	1.46	1.28	1.56	1.57	1.52	1.52	1.89	1.74
AVERAGE	1.43	1.67	1.56	1.66	1.64	1.82	1.63	1.72	1.79	1.64	1.73	1.86	1.90	1.92	1.71	1.84	1.91

1/ Other soybean producers include those with less than 10,000 tons production in 1990/91.

WORLD SOYBEAN PRODUCTION

	74/75	75/76	76/77	77/78	78/79	79/80	80/81	81/82	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91F
PRODUCTION (1,000 metric tons)																	
United States	33,102	42,139	35,070	48,097	50,859	61,525	48,921	54,135	59,610	44,518	50,644	57,127	52,868	52,746	42,153	52,354	52,302
Brazil	9,892	11,227	12,513	9,541	10,240	15,156	15,200	12,835	14,750	15,541	18,278	14,100	17,300	18,021	23,200	20,000	17,000
China	7,470	7,240	6,640	7,260	7,565	7,460	7,940	9,325	9,030	9,760	9,695	10,509	11,614	12,465	11,645	10,230	11,500
Argentina	485	695	1,400	2,700	3,700	3,600	3,500	4,150	4,200	7,000	6,750	7,300	7,000	9,700	6,500	10,750	10,300
India	35	70	150	180	220	350	442	467	491	614	955	1,020	891	898	1,547	1,715	2,100
Paraguay	220	284	377	333	549	575	600	600	520	550	950	600	950	1,100	1,615	1,500	1,600
Italy	--	--	--	--	--	--	--	9	9	62	110	286	806	1,589	1,408	1,600	1,540
Canada	301	367	250	580	516	657	690	607	848	735	917	1,012	960	1,270	1,153	1,219	1,327
Indonesia	590	522	523	617	680	653	704	521	536	769	870	950	900	950	1,200	1,100	1,200
Soviet Union	360	780	480	540	634	467	525	491	536	560	469	465	703	712	880	956	920
Thailand	110	114	114	96	159	102	100	132	113	179	246	309	356	338	517	672	480
Mexico	420	625	280	470	330	680	280	680	550	600	550	710	660	750	300	984	474
Korea, DPR	280	290	300	310	320	330	330	330	330	340	400	425	435	440	440	440	440
Romania	298	213	213	191	230	383	448	268	301	259	407	317	472	350	340	450	430
Bolivia	12	15	11	26	41	48	40	86	52	78	99	147	110	141	294	230	390
France	4	2	2	4	4	16	14	18	16	25	31	46	85	186	228	287	247
South Korea	319	311	295	319	293	257	216	257	233	226	254	234	199	203	239	252	233
Colombia	169	75	103	131	146	154	89	99	122	94	104	154	128	115	177	212	232
Japan	133	126	110	111	190	192	174	212	226	217	238	228	245	287	277	272	220
Turkey	9	7	8	6	3	3	2	15	36	46	60	75	120	120	70	120	180
South Africa	20	18	28	37	26	40	26	21	26	32	35	35	63	84	70	110	150
Yugoslavia	14	30	48	67	63	67	34	92	198	210	228	174	225	237	180	209	145
Egypt	2	5	11	27	79	106	92	130	166	162	143	133	140	140	130	100	125
Zimbabwe	28	45	44	70	84	89	66	89	79	90	86	84	108	119	121	109	122
Ecuador	3	8	14	19	23	30	31	35	35	6	46	57	85	92	102	108	107
Vietnam	15	22	20	24	20	32	56	76	64	67	86	90	95	95	120	120	105
Iran	18	70	102	86	113	95	120	125	130	96	90	90	90	90	90	90	90
Hungary	30	38	42	41	27	35	37	43	54	52	50	46	51	65	104	116	90
Australia	74	45	55	77	99	82	73	77	53	89	110	105	115	75	113	90	72
Nigeria	65	65	70	70	73	75	55	60	65	50	60	55	70	40	55	60	65
Uruguay	15	9	12	30	35	45	45	25	12	10	21	45	80	70	55	55	58
Zambia	--	--	--	--	1	4	4	7	8	13	15	17	22	32	34	36	44
Spain	39	14	6	8	17	15	14	6	5	2	4	5	2	4	13	27	43
Bulgaria	33	80	99	90	120	157	107	113	116	82	72	39	54	34	40	40	40
Syria	--	--	--	--	--	--	--	--	--	--	--	--	--	--	16	20	25
Burma	13	12	16	16	16	15	17	19	20	22	23	23	27	27	28	28	20
Greece	--	--	--	--	--	--	--	--	--	--	--	--	3	4	6	26	18
Guatemala	--	--	--	--	--	--	--	1	2	3	9	9	29	26	28	30	17
Philippines	6	8	8	7	8	9	10	11	8	8	7	6	7	7	8	10	12
Austria	--	--	--	--	--	--	--	--	--	--	--	--	--	--	12	10	10
Sri Lanka	--	--	--	--	--	--	--	--	--	--	--	--	--	2	10	10	10
Others 1/	72	64	61	57	45	42	31	29	21	19	23	28	36	32	32	36	47
TOTAL	54,656	65,635	59,475	72,238	77,528	93,546	81,033	86,196	93,571	83,186	93,135	97,055	98,104	103,656	95,550	106,783	104,530

1/ Other soybean producers include those with less than 10,000 tons production in 1990/91.

MARCH 1991

Production Estimates & Crop Assessment Division, FAS, USDA

WEST EUROPEAN FORESTRY SITUATION

Forest stands in several West European countries sustained extensive damage from storms with gale force winds, during early 1990. The massive blow-down caused sharp increases in roundwood supplies in West Germany (up 192 percent), Austria (up 11 percent), and the United Kingdom (up 6 percent). Larger harvests occurred in France, Belgium-Luxembourg, and the Netherlands in line with the long-term growth trend already evident in these countries. Only the northern and southern peripheral countries (Denmark, Italy, and Spain) recorded reductions in production of both roundwood and products.

WEST GERMANY: The West German wood-producing and wood-working industry was confronted with an unusual and difficult situation during 1990. Severe storms, in February 1990, uprooted and damaged trees equivalent to approximately 73 million cubic meters (CUM) of wood. When added to the 20 million CUM of wood harvested prior to the storms, the 1990 harvest totaled 93 million CUM--more than three times West Germany's annual requirement. The 73 million CUM of thrown timber (i.e. downed and broken) consisted of 55.8 million CUM of spruce, 7.9 million CUM of pine, 7.6 million CUM of beechwood, and 1.1 million CUM of oak. In an effort to stabilize the roundwood situation, the West German Government funded and implemented a program whereby 9.8 million CUM of the total 1990 harvest were put into wet storage, 17.9 million CUM in dry storage, 17.3 million CUM were sold as logs, and 48.0 million CUM were processed.

The sawmilling sector has invested heavily in new equipment over the past several years. Modern, high-capacity "profiler" equipment has increasingly replaced traditional, low-capacity frame-saw facilities. This additional processing capacity, combined with stronger demand from the construction, furniture and panel industries boosted 1990 production of lumber, veneer, plywood, particleboard, and fiberboards to record levels. Future growth is strongly tied to continued growth in the housing industry, joint government-industry efforts to reforest storm-damaged areas, and control of environmental damage to the growing stock.

AUSTRIA: After several unprofitable years, Austria's forestry sector experienced an economic turnaround in 1988, and continued growth in 1989. Further expansion was projected for 1990, but severe storms during February and March of 1990 caused widespread damage to Australian forests, resulting in the blow-down of approximately 4.8 million cubic meters (CUM) of standing timber. To avoid damage by elephant beetles and other pests, massive resources were rapidly mobilized to remove the downed trees. This significantly increased removal costs and depressed log prices.

Most of the storm damage occurred in the province of Upper Austria where the volume of wood damaged was greater than the region's average annual felling rate of 2.2 million CUM. Throughout the country, large trees were more badly damaged than smaller ones, and mixed stands proved less susceptible to "blow-down" than monocultures. Spruce trees, the mainstay of the Austrian industry, accounted for 89.5 percent of the total wood damaged. Hardwoods comprised only 6.2 percent. In an effort to reduce monetary losses in the forestry sector, the Agricultural Ministry quickly implemented the following program:

1. Subsidy payments ranging from AS 6,000-15,000 per hectare for the removal of damaged wood. The exact amount of the subsidy was determined by removal conditions.
2. Storage of damaged wood subsidized at the rate of AS 150 per cubic meter.
3. Subsidy payments for new road construction in damaged areas.
4. Ample low-interest credit for the purchase of forestry equipment and machinery.

During the first half of 1990, Austria's favorable economic situation and the large volume of storm-damaged trees increased the normal felling rate 47 percent over the same period in 1989. Actual fellings slackened during the latter half of 1990, as harvesting activities were restricted to the removal of damaged timber. The total 1990 harvest is currently estimated at a record 15.3 million CUM. Softwood log production reportedly accounted for two-thirds of this total, or 10.2 million CUM. The oversupply situation immediately after the storm sent softwood log prices spiraling downward. By August 1990, average prices had plummeted 18 percent to AS 1,075. The price drop would have been even greater had the Government not taken the initiative on two fronts. An immediate appeal was made to all sawmills to "buy Austrian". Secondly, the Government included in the subsidized storage program the proviso that logs be stored for a minimum of three months. However, because of quality concerns, a dual set of prices developed for wood from "storm areas" vis-a-vis wood from "non-storm areas". Softwood logs from "storm areas" sold for about 10-15 percent less than logs from unaffected areas. Because hardwoods sustained little storm damage, price declines were short-lived. Prices began trending upward in May. By August, the per cubic meter price for beechwood (the main Austrian hardwood species) was AS 1,038--approximately the same level as in August of 1989. Output of lumber and panel products continued to expand during 1990 in response to rising demand in both domestic and export markets.

UNITED KINGDOM: Roundwood production in the United Kingdom has been expanding since 1984 in line with industry efforts to satisfy a larger portion of the U.K.'s annual wood requirement with domestic supplies rather than imports. Total availability increased significantly during 1990 when storms felled a significant amount of wood. Prospects for sustained growth appear excellent. Intensive plantings carried out over the past several decades are expected to double yields from U.K. forests by the year 2005.

The leading wood products manufactured in the United Kingdom are softwood lumber, temperate hardwood lumber, medium density fiberboard and particleboard. Output has increased steadily, in recent years, mainly due to the greater availability of domestically produced sawlogs, and strong demand strong demand from non-industrial users requiring a variety of wood products for repairs, maintenance, improvements and do-it-yourself projects. The recent growth in output of temperate hardwood lumber reflects increasing substitution of temperate species for tropical ones, and a continuing shift in consumer preference toward light-colored hardwoods. Although particleboard production totaled a record 1.6 million CUM in 1990, medium density fiberboard (MDF) displayed the most dynamic growth in the wood products sector. Expansion of production capacity in 1988 boosted output that year by 80 percent, to 126,000 CUM. By 1990, output of MDF had reached a record 198,000 CUM, and had become a preferred substitute for other fiberboards and many traditional solid wood products.

FRANCE: The French wood industry fared well during 1990. Roundwood production reached a record 37.4 million CUM--in line with the long-term growth trend begun in 1982, but somewhat higher than originally projected because of the large volume of trees uprooted by high winds early in the year. Most of the downed trees were hardwood species, primarily beech. Because of falling export demand for temperate hardwoods, a significant portion of these damaged trees were not removed from the forests, resulting in a 6-percent decline in temperate log output for the year. In contrast, softwood log production increased for the fifth consecutive year, mainly due to strong export demand. Output of lumber and most panel products continued to rise relative to 1989 because of strong global demand from the building, packaging and furniture industries. Long-term prospects are especially bright for France's fiberboard and particleboard sectors given the recent increases in production capacity, the ongoing modernization of older processing facilities, growing demand for new types of particleboards and fiberboards, increased building activity, and sustained export demand.

DENMARK: The Danish forest products industry is currently in a slump and is expected to remain that way through 1991. This situation was fueled by a weak economy, low prices, government spending reductions, and stagnant construction activity. Denmark's 1990 timber harvest was 2.0 million CUM, 2 percent smaller than a year ago. The depressed financial situation in Denmark, and the competition presented by West Germany's massive stock of gale-damaged logs, precipitated an 8 percent drop in fellings of softwood logs. Reduced building activity slackened demand for softwood lumber and particleboard. Softwood log prices slumped throughout the year yielding only marginal profits for both loggers and millers. Many softwood mills were forced to shut down indefinitely. The Danish hardwood sector fared much better. Output of temperate hardwood logs and lumber increased during 1990, primarily in response to strong demand from the furniture manufacturing industry seeking to satisfy the consumer's preference for light-colored woods like ash, beech, oak and pine. Long-term expansion in the forestry sector currently hinges upon a strengthening of the Danish economy, Government initiatives to turn marginal soils into commercial forest land, and Denmark's continued dominance as the world's leading producer and and exporter of Christmas trees and greenery.

NETHERLANDS: The 1990 timber harvest in the Netherlands totaled a record 1.3 million CUM, up 15 percent from the 1989 volume. This is in line with the Government's long-term objective that the industry reach a forest product self-sufficiency rate of 25 percent by the year 2030. Most of the increase in production is expected to come from two species, Scotch Pine and Poplar. The Government recently instituted a variety of subsidy programs to encourage farmers to shift land into timber production. Approximately 1,000 hectares have been afforested to date, mostly in the heavy clay soils prevalent throughout the northern part of the country. Poplar and spruce have been the dominant species planted thus far. The Government envisions that forest plantings will increase by 1,000-1,500 hectares per year.

BELGIUM: Belgium's annual timber harvest has increased steadily for the past eight years. The total cut for 1990 reached a new high of 5.1 million CUM. Softwood log production exhibited a similar pattern--more than tripling in size from a 1982 level of 850,000 CUM, to 2.6 million CUM in 1990. Output of softwood lumber during 1990 was 1.1 million CUM, 10 percent greater than the 1989 level, and 46 percent above the previous 5-year average. Particleboard production has been expanding in recent years but at a much more moderate rate. Since 1988, output has increased by 5 percent annually culminating in a record 2.2 million CUM in 1990.

SPAIN: Spain's timber harvest declined for the second consecutive year, due to reduced demand from the construction industry, forest fires, and heavy damage to pine trees resulting from severe infestations of Gypsy moths. Total fellings for 1990 reached only 14.0 million CUM, 3 percent below the 1989 volume. Production of logs and lumber emulated this decline. The bright spot in Spain's wood industry is the fiberboard sector, where substantial investments to expand production capacity and develop new products, have spurred substantial growth. Production of hardboard and medium density fiberboard reached record levels of 208,000 CUM and 230,000 CUM, respectively, during 1990.

ITALY: Little growth occurred in Italy's forestry sector during 1990. The annual cut totaled 6.9 million CUM, slightly below the 7.0 million CUM harvested in 1989, due to declining yields from aging trees, high harvest costs, and fire damage. Marginal production declines were recorded for softwood logs, temperate hardwood logs and railroad ties. Output of temperate hardwood lumber was 10 percent below the 1989 level due to fluctuating supplies of raw material. The most significant downturn was a 20-percent drop in production of tropical hardwood lumber due to declining availability of tropical species. Production of poles, plywood, hardboard, and particleboard remained static at the 1989 level. The only processed products recording gains during 1990 were softwood lumber, due to increased domestic demand, and medium density fiberboard because of expanded production capacity.

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TABLE 19

EUROPE: FORESTRY PRODUCTION IN SELECTED COUNTRIES
(1,000 Cubic Meters)

	1984	1985	1986	1987	1988	1989	1990 1/
AUSTRIA:							
HARVEST	12,111	11,625	12,130	11,760	12,032	13,822	15,340
Softwood Logs	8,225	7,355	7,646	7,463	8,221	9,086	10,226
Temperate Hardwood Logs	481	386	416	395	424	465	487
Softwood Lumber	6,039	5,748	5,544	6,671	7,088	7,723	7,770
Temperate Hardwood Lumber	237	214	204	303	312	335	361
Railroad Ties/Sleepers	43	38	35	24	18	17	16
Veneer	19	19	19	18	20	21	22
Plywood	4	4	11	18	18	111	120
Fiberboard	88	86	87	89	97	96	101
Particleboard	1,152	1,199	1,236	1,308	1,429	1,405	1,615
BELGIUM-LUXEMBOURG:							
HARVEST	2,930	3,070	3,345	3,500	3,690	4,635	5,100
Softwood Logs	1,000	1,100	1,250	1,400	1,500	2,250	2,600
Temperate Hardwood Logs	750	750	765	670	700	725	700
Softwood Lumber	435	500	575	810	880	1,000	1,100
Temperate Hardwood Lumber	NA	NA	NA	440	453	468	480
Tropical Hardwood Lumber	57	65	65	44	33	35	35
Railroad Ties/Sleepers	16	16	16	16	16	15	15
Veneer	35	38	42	40	42	45	43
Plywood	58	50	58	60	62	65	65
Particleboard	1,750	1,850	1,950	2,025	2,000	2,100	2,200
DENMARK:							
HARVEST	2,506	2,193	2,130	2,072	2,163	2,102	2,050
Softwood Logs	1,040	1,441	1,396	1,172	1,222	1,196	1,100
Temperate Hardwood Logs	490	752	721	423	469	484	500
Softwood Lumber	260	340	291	244	233	281	200
Temperate Hardwood Lumber	69	62	58	50	62	60	70
Railroad Ties/Sleepers	21	4	4	10	5	0	1
Veneer	9	9	11	10	7	7	7
Hardboard	1	3	3	4	6	4	4
Particleboard	376	317	333	328	385	366	350

FOOTNOTES AT END OF TABLE

CONTINUED

TABLE 19 (Continued)

EUROPE: FORESTRY PRODUCTION IN SELECTED COUNTRIES
(1,000 Cubic Meters)

	1984	1985	1986	1987	1988	1989	1990 1/
FRANCE:							
HARVEST	30,232	30,550	31,993	33,070	35,628	37,274	37,370
Softwood Logs	11,003	10,785	11,111	11,608	12,469	13,000	13,200
Temperate Hardwood Logs	7,637	7,924	8,149	8,793	9,572	9,900	9,300
Poles/Pitprops	334	289	265	231	160	159	155
Softwood Lumber	5,617	5,699	5,740	5,956	6,340	6,900	7,000
Temperate Hardwood Lumber	2,762	2,729	2,865	2,930	3,160	3,360	3,400
Tropical Hardwood Lumber	511	473	525	517	526	550	550
Railroad Ties/Sleepers	139	146	158	167	191	170	140
Veneer	31	28	25	42	43	45	43
Plywood	475	490	471	451	487	512	515
Fiberboard	270	270	275	283	266	295	400
Particleboard	1,645	1,610	1,628	1,673	1,938	2,102	2,200
FEDERAL REPUBLIC OF GERMANY:							
HARVEST	26,590	31,075	29,177	28,693	29,508	31,819	93,000
Softwood Logs	12,709	15,041	12,854	13,005	14,108	15,978	73,000
Temperate Hardwood Logs	3,108	3,148	3,275	3,181	2,979	3,258	11,000
Softwood Lumber	8,139	7,895	9,545	9,680	10,459	11,571	12,250
Hardwood Lumber	1,593	1,550	1,608	1,571	1,576	1,599	1,700
Railroad Ties/Sleepers	194	185	191	158	142	124	110
Veneer	404	398	391	400	420	448	460
Plywood	360	336	342	350	370	406	450
Hardboard	219	219	199	203	91	100	110
Medium Density Fiberboard	0	0	0	0	50	127	240
Insulation Board	50	40	40	40	40	45	45
Particleboard	5,974	5,812	5,850	5,987	6,635	7,297	7,600
ITALY:							
HARVEST	NA	8,502	9,557	7,151	7,050	7,000	6,900
Softwood Logs	751	804	1,198	800	901	904	900
Temperate Hardwood Logs	589	1,656	2,005	2,050	1,749	1,717	1,700
Poles/Pitprops	1,071	1,189	476	155	150	140	140
Softwood Lumber	1,003	900	854	880	900	800	850
Temperate Hardwood Lumber	1,192	1,388	1,001	1,100	1,100	1,226	1,100
Tropical Hardwood Lumber	NA	80	60	50	70	150	120
Railroad Ties/Sleepers	52	45	64	50	66	59	58
Plywood	346	360	375	390	410	450	450
Hardboard	NA	NA	165	130	116	116	116
Medium Density Fiberboard	NA	NA	85	110	450	500	660
Particleboard	1,300	1,350	1,400	1,700	3,090	3,000	3,000

FOOTNOTES AT END OF TABLE

CONTINUED

MARCH 1991

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 19 (Continued)

EUROPE: FORESTRY PRODUCTION IN SELECTED COUNTRIES
(1,000 Cubic Meters)

	1984	1985	1986	1987	1988	1989	1990 1/
NETHERLANDS:							
HARVEST	NA	1,090	1,110	1,192	1,115	1,130	1,300
Softwood Logs	198	230	230	230	230	145	170
Temperate Hardwood Logs	153	220	260	280	265	190	190
Softwood Lumber	155	172	152	164	140	140	150
Temperate Hardwood Lumber	134	182	161	178	210	190	190
Tropical Hardwood Lumber	NA	58	49	45	70	70	70
Veneer	16	18	16	15	15	16	16
Plywood	17	18	16	14	14	13	14
Particleboard	30	40	40	40	40	40	40
SPAIN:							
HARVEST	11,500	11,900	12,100	14,100	15,000	14,500	14,000
Softwood Logs	NA	6,186	7,287	5,400	5,500	5,300	5,100
Temperate Hardwood Logs	NA	3,830	3,906	4,000	3,100	3,000	2,900
Softwood Lumber	1,641	1,680	1,840	1,923	2,080	2,175	2,100
Temperate Hardwood Lumber	328	335	547	612	665	640	620
Tropical Hardwood Lumber	122	150	200	193	240	270	260
Softwood Plywood	0	0	0	0	10	20	25
Temperate Hardwood Plywood	NA	NA	110	200	215	215	215
Tropical Hardwood Plywood	120	140	140	155	140	150	145
Hardboard	140	140	140	140	140	165	208
Medium Density Fiberboard	140	130	140	140	140	215	230
Particleboard	1,300	1,300	1,300	1,400	1,400	1,700	1,600
UNITED KINGDOM:							
HARVEST	3,780	4,665	5,130	5,345	5,885	6,503	6,916
Softwood Lumber	1,191	1,420	1,452	1,574	1,653	1,825	1,925
Temperate Hardwood Lumber	317	276	334	261	264	349	363
Tropical Hardwood Lumber	23	19	21	19	18	15	12
Veneer	10	8	9	9	11	9	7
Plywood	17	15	16	15	15	15	0
Hardboard	25	10	9	10	11	0	0
Medium Density Fiberboard	48	66	70	70	126	173	198
Insulation Board	29	28	29	31	27	27	25
Particleboard	611	835	980	1,098	1,486	1,437	1,560

1/ Preliminary.

Malaysian Palm Oil Production

Malaysia is the largest palm oil producer in the world and accounts for 56 percent of the total production and 70 percent of the world palm oil exports. Malaysia is forecast to produce 6.2 million tons of crude palm oil in 1990/91, down 3 percent from last year. Tree stress due to abnormally dry weather during the last quarter of 1989 and first half of 1990 and overproduction during 1989/90 are blamed for the decline. There is generally a 12 to 18 month lag in the effect of rainfall on palm oil yields. Also, a heavy crop in one year can lead to a reduction in the subsequent crop, even if fertilizer and other external requirements are favorable.

Palm oil is a year-round crop but in Malaysia production follows a seasonal cycle of steadily falling output, starting in October and reaching the lowest output in January or February. The output then turns around in March and reaches a peak during August or September. Since 1986/87, total output has been increasing at about 10 percent per year. The 1990/91 crop will be the first downturn since 1986/87 when the crop slipped 4 percent from the previous year. Even though the 1990/91 crop is estimated lower than last year, the Malaysian government is still expecting further expansion in coming years. For example, the Government is encouraging palm oil refiners to set up joint ventures overseas and is specifically targeting China, Pakistan, the USSR, and Mexico. Presently, there are refineries with Malaysian interests in England, the United States, and Egypt. The Government is also ready to grant duty exemption for crude palm oil exports for such joint ventures.

Palm oil production estimates in Malaysia are released by the Government's Palm Oil Registration and Licensing Authority (PORLA) with statistics reported for two regions: Peninsular Malaysia and East Malaysia. Peninsular Malaysia produced nearly 90 percent of the country's palm oil last year. Palm oil area has been expanding due to the Government's land development projects. Nearly 85 percent of the oil palm area is located on Peninsular Malaysia; however, area in East Malaysia is growing at a faster pace. In the future, Malaysia's Government hopes to continue expansion of palm oil production by improving yields rather than increasing oil palm plantings.

Malaysia's Federal Land Development Authority (FELDA) is the largest producer of palm oil in Malaysia, operating over 500,000 hectares of the nearly 2 million hectares devoted to palm oil production. FELDA is committed to opening new lands to cultivation and administers the 1990 privatization scheme. This scheme is managed estate-style by private companies, instead of individual landowners, but participants are given shares in the company. Purchases of the shares are deducted from their bonuses and dividends and not from their monthly wages.

The Palm Oil Research Institute of Malaysia has been researching ways to increase demand for palm oil. Demand in recent years has not kept pace with rapid supply expansion. Some of the research effort is focused on non-food uses of palm oil. For example, a diesel fuel substitute is already in the final stage of testing with large-scale field trials scheduled for buses. Previous tests using palm fuel in taxis had satisfactory results. Also, nine factories will be set up this year to make "polyols" - a base product used in the manufacture of polyurethane. A pilot plant is expected to be operational soon.

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TABLE 20

MALAYSIAN PALM OIL PRODUCTION BY REGION

IN THOUSAND METRIC TONS

MONTH	PENIN. MALAYSIA	EAST MALAYSIA	TOTAL	PENIN. MALAYSIA	EAST MALAYSIA	TOTAL	PENIN. MALAYSIA	EAST MALAYSIA	TOTAL
	1988/89			1989/90			1990/91 *		
October	451	57	508	557	70	627	495	75	570
November	406	52	458	564	72	636	426	68	494
December	376	43	419	459	71	530	341	64	405
January	325	39	364	375	65	440	276	55	331
February	306	35	341	365	56	421			
March	333	36	369	397	58	455			
April	348	42	390	360	53	413			
May	387	57	444	483	69	552			
June	456	47	503	454	67	521			
July	511	48	559	499	63	562			
August	578	56	634	550	73	623			
September	581	66	647	557	75	632			
TOTAL	*5,058*	*578*	*5,636*	*5,620*	*792*	*6,412*	---	---	*6,200 f*

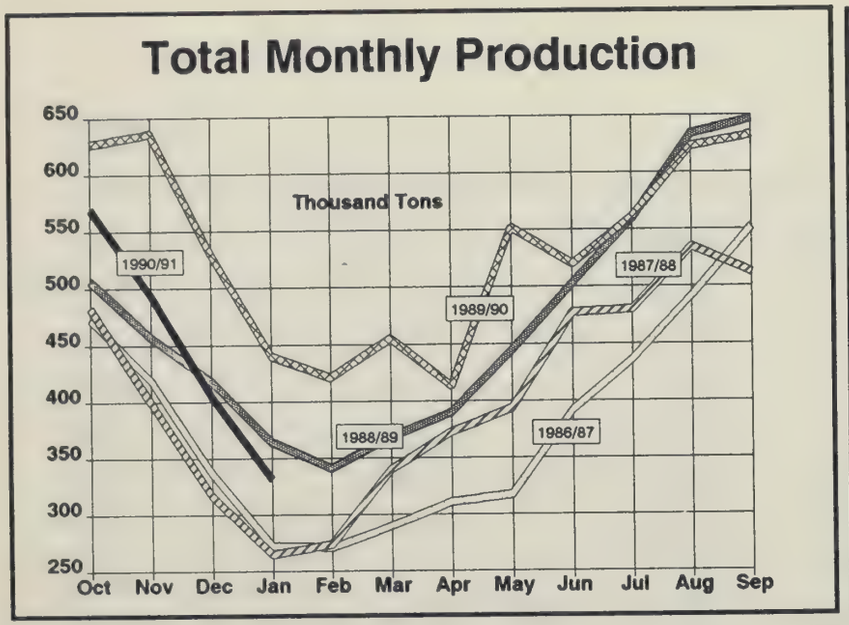
* Monthly February - September data for 1990/91 are not estimated yet.

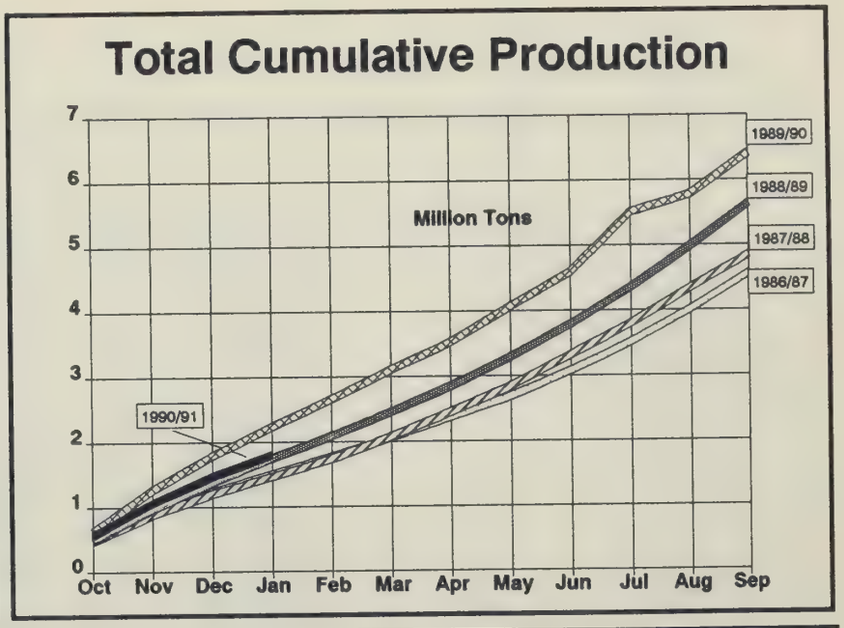
March 1991

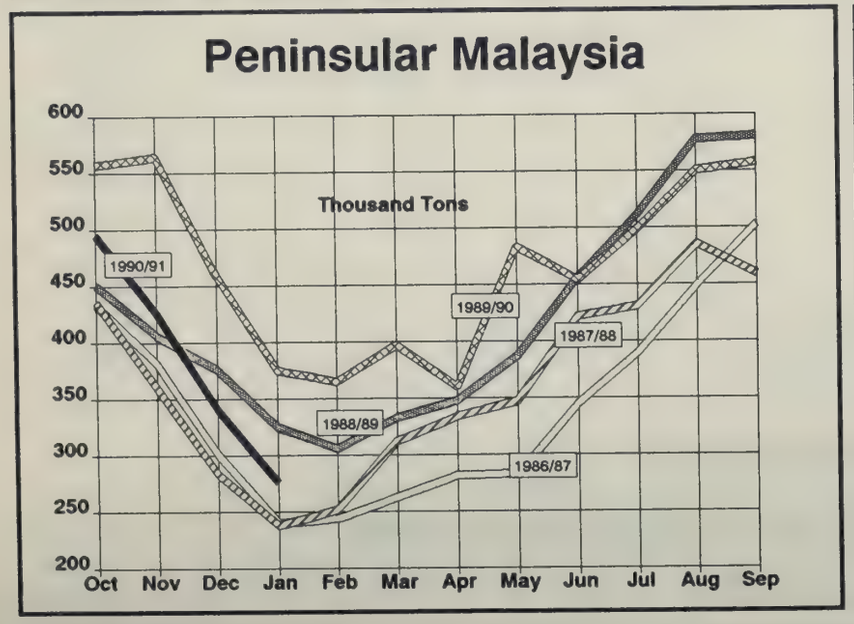
Production Estimates & Crop Assessment Division, FAS, USDA

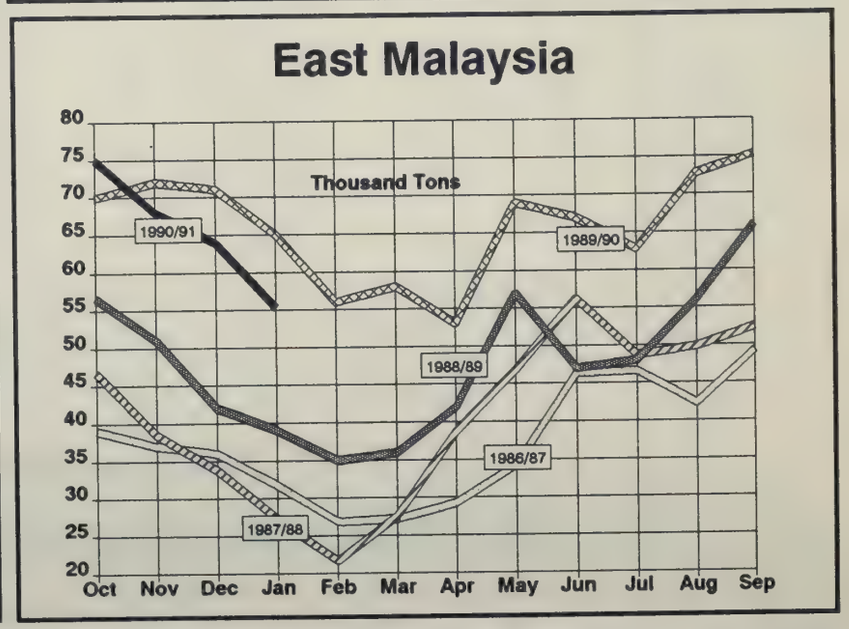
CHART 1

Malaysian Palm Oil Production









YUGOSLAV GRAIN SITUATION AND OVERVIEW

Yugoslavia's 1990/91 total grain production is estimated at 14.0 million tons, down 2.0 million or 13 percent from 1989's harvest. The decline in production is primarily attributed to the effect of last summer's drought on coarse grains, particularly corn. Corn production fell 30 percent from the previous year because of the dry weather, its fourth consecutive dry summer. Grain area has fallen approximately 5 percent and yields have risen 7 percent since the early 1980's.

The outlook for 1991/92 winter grains is uncertain. Planted area is up slightly from last year, but most seeding was done after the optimal planting period. Low temperatures in late January and early February may have adversely affected wintering grains, especially those lacking adequate snow cover.

Wheat

Yugoslav 1990 wheat production is estimated at a record 6.3 million tons, 13 percent larger than the 1989 crop. The hot, dry weather during July 1990 adversely affected other crops, but proved beneficial to wheat. Low soil moisture reserves in the Autumn of 1990, resulting from the summer's drought, prevented farmers from sowing 1991 wheat during the optimal period (October 1-25). However, sown area is reportedly up marginally from 1990's level. Production areas in the north received precipitation, allowing farmers there to plant up to 70 percent of their crop. Southern growing areas however, were sown after the optimal period. The late start may result in lower yields. Much of Yugoslavia received frequent precipitation and warmer-than-normal temperatures during December 1990 and the first half of January 1991. This improved soil moisture reserves and was favorable for the wintering wheat crop.

Use of quality seeds and fertilizers during sowing last fall was negatively impacted by Yugoslavia's weakened economy. Production credits given to farmers declined in 1990 and as of February 1991 many farmers had yet to be paid for crops delivered in 1990. In addition to the lack of buying power caused by the deferred 1990 payments, the government has proposed changes in the subsidy system that will increase the prices of fertilizers, quality seed, and plant protection chemicals. Subsidies previously went to industries producing inputs, but the proposal, if enacted, will likely cause subsidies to go to growers of selected commodities. Without industry subsidies, input prices could escalate. Additionally, price premiums will not be paid for any type of grain, as grains are not one of the proposed select commodities.

Despite farmers' dissatisfaction with the 1990 wheat purchase price and delayed payments for their production, area sown to wheat reportedly has increased, reflecting farmers' perception that the federal or republican governments will always assist in purchasing wheat, as it is considered a vital commodity. The increased area also shows that wheat remains a competitive crop. The use of wheat as a feed grain has more than doubled, in part due to the drought-stricken 1990 corn crop. Farmers would rather utilize wheat they already have than purchase corn in the midst of cash liquidity problems.

Coarse Grains

Yugoslav 1990 coarse grain production is estimated at 7.6 million tons, down 28 percent from the previous year and down almost 31 percent from the 5-year average. Corn is by far the most common coarse grain grown in Yugoslavia. Corn made up about 47 percent of total 1990 grain production even after a nearly 30 percent reduction due to the 1990 summer drought. Corn contributed nearly 60 percent to 1989 total grain production and contributed more towards the total than wheat in both 1989 and 1990. The 1990 corn harvest was the smallest since 1965, primarily as a result of the combination of heat stress (especially during July) and reduced soil moisture supplies. Eastern and southern growing areas were especially hard hit. A four percent reduction in planted area also contributed to the decline. Soil moisture in Yugoslavia was only 50 percent of normal during the 1990 growing season. Precipitation for the period October through December 1990 has raised soil moisture to normal levels for the 1991/92 crops. Drought conditions for the fourth consecutive year adversely affected production of hybrid seed corn and depleted stocks, requiring imports from the United States.

Although area planted to corn in 1991 is dependent on April and May weather, a slight increase from last year is expected. The primary reason for this is a decreased interest in oilseeds and sugar beets. In 1990, farmers had difficulty selling these commodities to the processing industry. Additionally, payments for most farmers were delayed for several months and some farmers have yet to be paid. This has reportedly caused farmers to prefer to plant corn, which they can use on their own farm, rather than crops that have to be delivered to the processing industry. The processing industry is having liquidity problems, due to the economy, and will likely have difficulty paying producers for crops.

Overview

Yugoslavia produces 13 percent of Eastern Europe's grain, 12 percent of its oilseeds, and 1 percent of its cotton. Agriculture is diversified, though corn and wheat are produced far more than other grains. Slightly larger than Wyoming, Yugoslavia borders Albania, Austria, Bulgaria, Greece, Hungary, Italy, Romania, and the Adriatic Sea. Only 28 percent of the land is arable. The Sava and Danube rivers are located near the Pannonian Plains in Vojvodina province, which stretch northward towards the large Hungarian Plain. The climate is temperate, with hot, dry summers, and mild, rainy winters along the coast.

Agriculture, including fisheries and forestry, comprises only 14 percent of Yugoslavia's economy and employs about 20 percent of the population. More than 80 percent of the agricultural land is privately owned. Most production occurs on the fertile plains in Vojvodina. Because of the mountainous topography, large-scale production is limited in most of the country. Private sector farmers hold 83 percent of the arable land, and make up more than 90 percent of the agricultural labor force. There are many small land holdings in Yugoslavia, with the maximum size being about 10 hectares, however the average private farm is 3 hectares, and may contain 10 plots. This fragmentation is a cause for low productivity in the private sector. Other factors include lack of inputs and investment.

Jay Kress (202) 475-5142

TABLE 21

YUGOSLAV GRAIN: HARVESTED AREA, YIELD AND PRODUCTION

	Area (1000 Ha)	Yield (MT/Ha)	Production (1000 Tons)
Wheat			
1979/80	1,524	2.96	4,512
1980/81	1,516	3.36	5,091
1981/82	1,386	3.08	4,270
1982/83	1,558	3.35	5,218
1983/84	1,609	3.43	5,524
1984/85	1,458	3.84	5,595
1985/86	1,348	3.59	4,839
1986/87	1,346	3.55	4,776
1987/88	1,455	3.62	5,272
1988/89	1,506	4.18	6,300
1989/90	1,479	3.79	5,599
1990/91 Mar	1,495	4.25	6,359
Coarse Grains			
1979/80	2,815	3.94	11,085
1980/81	2,779	3.79	10,521
1981/82	2,859	3.82	10,918
1982/83	2,762	4.40	12,152
1983/84	2,766	4.24	11,716
1984/85	2,805	4.41	12,382
1985/86	2,862	3.82	10,933
1986/87	2,834	4.79	13,569
1987/88	2,614	3.70	9,671
1988/89	2,668	3.24	8,646
1989/90	2,693	3.89	10,474
1990/91 Mar	2,637	2.91	7,663
Corn			
1979/80	2,251	4.48	10,084
1980/81	2,202	4.23	9,317
1981/82	2,297	4.27	9,807
1982/83	2,246	4.95	11,126
1983/84	2,264	4.73	10,719
1984/85	2,331	4.84	11,293
1985/86	2,400	4.12	9,896
1986/87	2,369	5.29	12,526
1987/88	2,218	4.00	8,863
1988/89	2,269	3.39	7,697
1989/90	2,268	4.15	9,415
1990/91 Mar	2,213	2.99	6,616

TABLE 21 (Continued)

YUGOSLAV GRAIN: HARVESTED AREA, YIELD AND PRODUCTION

	Area (1000 Ha)	Yield (MT/Ha)	Production (1000 Tons)
Barley			
1979/80	291	2.17	631
1980/81	324	2.55	826
1981/82	310	2.32	720
1982/83	284	2.36	669
1983/84	280	2.36	661
1984/85	271	2.76	748
1985/86	264	2.67	704
1986/87	267	2.63	703
1987/88	213	2.37	504
1988/89	222	2.77	615
1989/90	242	2.90	702
1990/91 Mar	245	2.82	692
Oats			
1979/80	209	1.35	283
1980/81	194	1.52	294
1981/82	194	1.60	311
1982/83	176	1.53	269
1983/84	168	1.48	248
1984/85	153	1.67	256
1985/86	151	1.67	252
1986/87	152	1.71	260
1987/88	140	1.66	232
1988/89	135	1.87	253
1989/90	144	1.94	279
1990/91 Mar	139	2.01	280
Total Grains			
1979/80	4,347	3.60	15,630
1980/81	4,304	3.64	15,654
1981/82	4,254	3.58	15,230
1982/83	4,329	4.02	17,412
1983/84	4,384	3.94	17,280
1984/85	4,272	4.22	18,013
1985/86	4,219	3.75	15,808
1986/87	4,189	4.39	18,393
1987/88	4,079	3.68	14,991
1988/89	4,183	3.58	14,983
1989/90	4,178	3.85	16,103
1990/91 Mar	4,138	3.40	14,059

* U.S. G.P.O.:1991-281-074:40192/FAS

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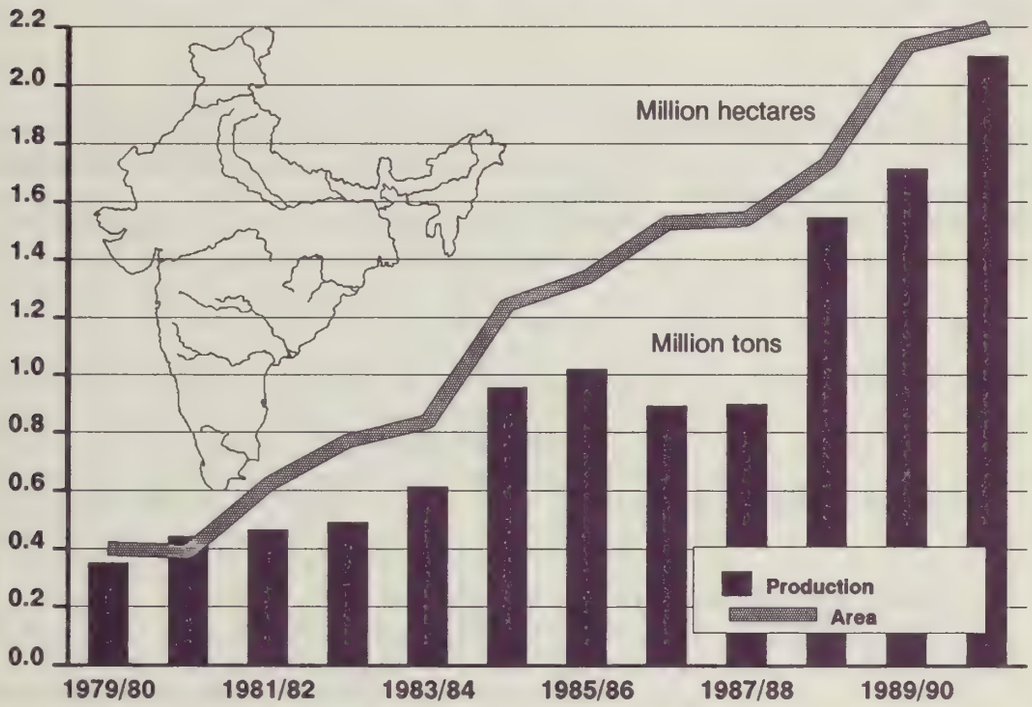
WAP 4-91
April 1991

World Agricultural Production

India : Soybean Area and Production



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This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-253), April 10, 1991.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 382-8888 or by FAX (202) 447-7729.

****
* The next issue of World Agricultural Production will be released at 3 p.m. *
* eastern time on May 10, 1991. *
****

CONVERSION TABLE

Metric Tons to Bushels		Metric Tons to 480-lb. Bales	
Wheat & Soybeans	= MT*36.7437	Cotton	= MT*4.592917
Corn, Sorghum, Rye	= MT*39.36825		
Barley	= MT*45.929625		
Oats	= MT*68.894438	Metric Tons to Hundredweight	
1 hectare	= 2.471044 acres	Rice	=MT*22.04622
1 kilogram	= 2.204622 pounds		

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PRODUCTION HIGHLIGHTS FOR 1990/91

April 1991

WHEAT: World production for 1990/91 is estimated at a record 590.1 million metric tons, up 1.1 million or less than 1 percent from last month and up 10 percent from last year's harvest. Foreign production is projected at a record 515.6 million tons, up 1.1 million or less than 1 percent from last month and up 7 percent from 1989/90. U.S. output is projected 74.5 million tons, unchanged from last month, but up 34 percent from 1989/90. Country highlights are as follows:

- **Eastern Europe** — Production is estimated at 45.2 million tons, up 0.4 million or 1 percent from last month and up 2 percent from the previous year. The increase is due to higher estimated yield in Poland.

- **Chile** — Production is estimated at 1.7 million tons, up 0.3 million or 20 percent from last month, but down 3 percent from last year. The increase reflects both greater estimated harvested area due to higher support prices and higher yield.

- **Egypt** — Production is estimated at 4.3 million tons, up 0.3 million or 7 percent from last month and up 35 percent from last year. This year marks the fourth consecutive production record for wheat. The increase is due to higher estimated area and yield.

- **Sudan** — Production is estimated at 0.5 million tons, up 0.2 million or 67 percent from last month and up 22 percent from last year. The increase is due to substantially higher estimated area.

COARSE GRAINS: World production for 1990/91 is estimated at 826.0 million tons, up 0.3 million or less than 1 percent from last month and up 3 percent from last year. Foreign production is estimated at a record 595.4 million tons, up 0.3 million or less than 1 percent from March and up 3 percent from last year. U.S. production is estimated at 230.6 million tons, unchanged from last month, but up 4 percent from last year. Country highlights are as follows:

- **South Africa** — Production is estimated at 7.4 million tons, up 0.9 million or 14 percent from last month, but down 23 percent from last year. Favorable March weather and recent estimates released by the South African Government led to higher estimated corn area and yield. Sorghum production was adjusted lower.

- **Argentina** — Production is estimated at 10.9 million tons, up 0.5 million or 5 percent from last month and up 32 percent from last year. Beneficial spring and summer rains have increased estimated yields for corn and sorghum. Growing conditions are reportedly the best in the last 5 years.

- **Other W. Europe** Production is estimated at 13.6 million tons, up 0.3 million or 2 percent from last month and up 10 percent from last year. In Austria, higher estimated yields for barley, corn, and rye more than offset a slight fall in oats production.

- **Malawi** Production is estimated at 1.6 million tons, up 0.3 million or 20 percent from last month and up 21 percent from last year. A larger estimated corn area accounts for the revision.

- **Tanzania** Production is estimated at 3.2 million tons, up 0.2 million or 8 percent from last month and up 2 percent from last year. An increase in estimated corn area more than offset a fall in sorghum area.

- **Eastern Europe** Production is estimated at 61.7 million tons, up 0.2 million or less than 1 percent from last month, but down 9 percent from the previous year. The increase is due to changes in Poland, where increases in rye, oats, and mixed grains more than offset decreases in corn and barley.

- **China** Production is estimated at 104.0 million tons, down 0.7 million or less than 1 percent from last month, but up 11 percent from last year. Sorghum and millet production were lowered based on revised area estimates from Chinese Government sources.

- **Zimbabwe** Production is estimated at 1.9 million tons, down 0.3 million or 14 percent from last month and down 15 percent from last year. Dry weather has adversely impacted estimated corn yield.

- **Brazil** Production is forecast at 24.2 million tons, down 0.3 million or 1 percent from last month, but up 7 percent from last year. Mid-season frost reduced estimated barley area and yield; the expected yield for oats also experienced a reduction. Sorghum area and yield are estimated lower due to dry weather.

- **Niger** Production is estimated at 1.7 million tons, down 0.2 million or 12 percent from last month, but up 5 percent from last year. Inadequate precipitation late in the growing season reduced estimated area and yields for both millet and sorghum.

- **Zambia** — Production is estimated at 0.9 million tons, down 0.2 million or 17 percent from last month and down 18 percent from last year. The decline is due to lower estimated corn area and yield.

RICE (MILLED-BASIS): World production for 1990/91 is estimated at a record 349.1 million tons, down 0.7 million or less than 1 percent from last month, but up 1 percent from the 1989/90 crop. Foreign production in 1990/91 is projected at a record 344.1 million tons, down 0.7 million or less than 1 percent from last month, but up 2 percent from last year. U.S. output is projected at 4.9 million tons, unchanged from last month, but down 4 percent from last season. Country highlights are as follows:

- **Thailand** — Production is estimated at 11.4 million tons, down 0.6 million or 5 percent from last month and down 14 percent from last year. Unfavorable weather and extensive planthopper damage caused yield to be estimated lower.

- **Burma** — Production is estimated at 8.2 million tons, down 0.2 million or 2 percent from last month, but up 1 percent from last year's crop. A decrease in harvested area and reduced fertilizer applications contributed to the decline in estimated production.

OILSEEDS: Total world oilseeds production during 1990/91 is forecast at 218.1 million tons, up 0.8 million from last month and up 2 percent from 1989/90. Foreign production during 1990/91 is projected to be a record 157.5 million tons, up 0.8 million from last month and up 2 percent from last year. U.S. total oilseed production is unchanged from last month at an estimated 60.6 million tons, but up 1.3 million or 2 percent from last year.

* **Soybeans**: World production for 1990/91 is estimated at 104.8 million tons, up 0.3 million from last month, but down 2 percent from last year. Total foreign soybean output is estimated at 52.5 million tons, up 0.3 million from last month, but down 4 percent from 1989/90. Country highlights are as follows:

  - **United States** — Production is estimated at 52.3 million tons, unchanged from last month, but down slightly from last year.

  - **Argentina** — Production is estimated at a record 11.0 million tons, up 0.7 million or 7 percent from last month and up 2 percent from last year. Beneficial spring and summer rains have increased yield potential for first and second crop soybeans.

- o **China** — Production is estimated at 11.4 million tons, down 0.1 million or 1 percent from last month, but up 11 percent from last year. The revision is based on a 2-percent reduction in estimated area. Although soybean area declined in 1990, average yield was at a record level.

- o **Paraguay** — Production is forecast at 1.4 million tons, down 0.2 million or 13 percent from last month and down 7 percent from last year. The decrease in production is due to inadequate and poorly distributed rainfall, which seriously reduced yield prospects in the major soybean growing region.

* **Cottonseed:** World production for 1990/91 is forecast at 34.1 million tons, down marginally from last month, but up 9 percent from last year. Total foreign production is estimated at 28.5 million tons, down marginally from last month, but up 5 percent above last year. Country highlights are as follows:

  - o **United States** — No change in USDA estimates this month. Production is estimated at 5.5 million tons, up 30 percent from last year.

* **Peanuts:** World production for 1990/91 is forecast at 21.6 million tons, up 0.2 million or 1 percent from last month, but down 2 percent from last year. Total foreign production is estimated at 19.9 million tons, up 0.2 million or 1 percent from March, but down 1 percent from last year. Country highlights are as follows:

  - o **United States** — Production is unchanged from last month at an estimated 1.6 million tons, down 10 percent from last year.

  - o **China** — Production is estimated at 6.0 million tons, up 0.2 million or 3 percent from last month and up 12 percent from last year. Good weather throughout the growing season and excellent harvest conditions increased average yield.

* **Sunflowerseed:** World production for 1990/91 is forecast at 21.8 million tons, up 0.1 million or less than 1 percent from last month, but down 1 percent from last year. Total foreign production is estimated at 20.7 million tons, up 0.1 million or 1 percent from last month, but down 2 percent from last year. Country highlights are as follows:

  - o **United States** — Production is unchanged from last month at an estimated 1.0 million tons, up 29 percent from last year.

- o **Argentina** — Production is estimated at 3.6 million tons, up 0.2 million or 6 percent from last month, but down 5 percent from last year. While harvested area is estimated to be below last year, excellent summer weather is expected to increase average yield to a record level.

* **Rapeseed**: World production for 1990/91 is forecast at a record 25.4 million tons, up 0.5 million or 2 percent from last month and up 16 percent from last year. Country highlights are as follows:

  - o **India** — Production is estimated at a record 5.3 million tons, up 0.5 million or 10 percent from last month and up 29 percent from last year. Harvested area and average yield is forecast at a record level. High prices at sowing boosted planted area, while ideal winter weather lead to significantly improved yield.

* **Flaxseed**: World production for 1990/91 is forecast at 2.3 million tons, unchanged from last month, but up 26 percent from last year. While production by the United States is small, this year's output is expected to increase by 213 percent over last year, to 97,000 tons. Total foreign production is pegged at 2.2 million tons, unchanged from last month, but up 23 percent from last year.

* **Copra**: World production for 1990/91 is forecast at 4.9 million tons, up marginally from last month and up 2 percent over last year. Copra production reached a record 5.3 million tons in 1985/86. There were no significant country changes this month.

* **Palm Kernels**: World production for 1990/91 is forecast at 3.3 million tons, down 0.1 million or 4 percent from last month and down 1 percent from last year. Country highlights are as follows:

  - o **Malaysia:** — Production is estimated at 1.8 million tons, down 0.1 million or 6 percent from last month and down 7 percent from 1989/90. The decrease is due to reduced yields caused by tree-stress following 2 years of very heavy output and below normal rainfall for most of 1989.

* **Palm Oil**: World production for 1990/91 is forecast at 10.9 million tons, down 0.2 million or 2 percent from last month and down marginally from last year. Country highlights are as follows:

  - o **Malaysia:** — Production is estimated at 6.0 million tons, down 0.2 million or 3 percent from last month and down 6 percent from last year. The decrease is attributable to the effects of tree-stress following 2 years of very heavy output and below normal rainfall during much of 1989.

COTTON: World cotton production in 1990/91 is estimated at 87.0 million bales, down 0.6 million or 1 percent from last month, but up 7.1 million bales or 9 percent from last year. Foreign production is estimated at 71.5 million bales, down 0.4 million from last month, but up 3.8 million bales or 6 percent from the 1989/90 estimate. Country highlights are as follows:

- **United States** — Production is estimated at 15.5 million bales, down 0.1 million or 1 percent from last month but up 27 percent from last year. Yields are forecast lower.

- **Brazil** — Production is forecast at 3.2 million bales, down 0.2 million or 6 percent from last month, but up 6 percent from last year. Area planted increased over last year as soybean area shifted to cotton in the center-south. The decline from last month's production estimate is a result of yield reductions caused from inadequate and poorly distributed rainfall offsetting area expansion.

- **India** — Production is estimated at 9.6 million bales, down 0.2 million or 2 percent from last month, and down 8 percent from last year's record crop. Yield is forecast lower due to weather problems, including drought in Gujarat and late season heavy rainfall in north and central India.

- **Pakistan** — Production is estimated at a record 7.5 million bales, up 0.2 million or 3 percent from last month and up 12 percent from last year. Yields are forecast significantly higher as a result of late season harvest figures that boosted overall output. Pest and disease losses were reportedly insignificant this year.

- **Paraguay** — Production is estimated at 1.0 million bales, down 0.3 million or 22 percent from last month, and down 3 percent from last year. Area increased over last year in response to strong 1990 producer prices. The decline from last month's production estimate is a result of weather-induced yield reductions that more than offset the expansion in area.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	1990/91	1988/89	1989/90	Mar.	Apr.	1988/89	1989/90	Mar.	Apr.
	--Million Acres--			--Million Acres--			--Bushels per Acre--				--Million Bushels--			
All Wheat	65.5	76.6	77.3	53.2	62.2	69.4	34.1	32.7	39.5	39.5	1,812	2,037	2,739	2,739
Winter	48.8	55.1	57.0	39.8	41.5	50.0	39.2	35.0	40.7	40.7	1,562	1,455	2,033	2,033
Other	16.7	21.5	20.3	13.4	20.7	19.4	18.7	28.1	36.4	36.4	250	582	705	705
Rye	2.4	2.0	1.6	0.6	0.5	0.4	24.7	28.2	27.1	27.1	15	14	10	10
Soybeans	58.8	60.8	57.8	57.4	59.5	56.5	27.0	32.3	34.0	34.0	1,549	1,924	1,922	1,922
Corn	67.7	72.2	74.2	58.3	64.7	67.0	84.6	116.3	118.5	118.5	4,929	7,525	7,933	7,933
Sorghum	10.3	12.6	10.5	9.0	11.1	9.1	63.8	55.4	62.9	62.9	577	615	571	571
Barley	9.8	9.1	8.2	7.6	8.3	7.5	38.0	48.6	55.9	55.9	290	404	419	419
Oats	13.9	12.1	10.4	5.5	6.9	5.9	39.3	54.3	60.1	60.1	218	374	357	357
							--Pounds per Acre--				---Million CWT.---			
Rice	2.9	2.7	2.9	2.9	2.7	2.8	5,514	5,749	5,507	5,507	159.9	154.5	154.9	154.9
											---Million 480-Pound---			
All Cotton	12.5	10.6	12.4	11.9	9.5	11.7	619	614	640	635	15.4	12.2	15.6	15.5

1/ Source: All estimates are provided by the National Agricultural Statistics Service (NASS) of the U.S. Department of Agriculture, with the exception of the April 1990/91 cotton estimate which reflects the Bureau of Census Cotton Ginnings Report released March 21, 1991.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			USSR	Asia					South America		Selected Other			All Other Countries
			United States	Canada	Mexico	EC-12	Oth. W. Europe	Eastern Europe		China	India	Indo-nesia	Paki-stan	Thai-land	Argen-tina	Brazil	Aus-tralia	South Africa	Turkey	
	—Million Metric Tons—																			
Wheat																				
1988/89	500.4	451.1	49.3	16.0	3.2	74.7	3.8	44.8	84.4	85.4	46.2	0.0	12.7	0.0	8.4	5.8	14.1	3.5	15.0	17.0
1989/90 prel.	537.0	481.6	55.4	24.6	4.0	78.6	4.4	44.3	92.3	90.8	54.1	0.0	14.4	0.0	10.2	5.6	14.1	2.0	11.5	15.4
1990/91 proj.																				
March	589.0	514.5	74.5	31.8	3.9	80.6	5.0	44.8	108.0	96.5	49.7	0.0	14.3	0.0	11.2	3.2	15.7	1.7	14.0	17.4
April	590.1	515.6	74.5	31.8	3.9	80.6	5.0	45.2	108.0	96.5	49.7	0.0	14.3	0.0	11.2	3.1	15.7	1.7	14.0	17.9
Coarse Grains																				
1988/89	732.1	582.5	149.7	19.7	13.8	88.1	11.4	61.3	97.5	94.2	31.3	5.2	2.4	4.4	7.3	26.7	6.7	13.0	10.0	89.6
1989/90 prel.	800.4	579.0	221.4	23.5	14.1	82.3	12.4	68.1	104.8	93.5	34.6	5.0	2.8	4.3	8.3	22.5	6.9	9.6	7.5	78.9
1990/91 proj.																				
March	825.7	595.1	230.6	26.0	16.3	76.9	13.3	61.5	114.0	104.7	35.0	5.3	2.9	4.0	10.4	24.4	6.8	6.5	8.9	78.2
April	826.0	595.4	230.6	26.0	16.3	76.8	13.6	61.7	114.0	104.0	35.0	5.3	2.9	4.0	10.9	24.2	6.8	7.4	8.9	77.7
Rice (Milled)																				
1988/89	330.9	325.7	5.2	0.0	0.3	1.3	0.0	0.2	1.9	118.4	70.5	27.5	3.2	14.0	0.3	7.5	0.6	0.0	0.2	23.8
1989/90	344.0	338.9	5.1	0.0	0.4	1.4	0.0	0.2	1.7	126.1	74.1	29.1	3.2	13.3	0.2	4.9	0.7	0.0	0.2	23.3
1990/91																				
March	349.7	344.8	4.9	0.0	0.2	1.6	0.0	0.2	1.7	129.5	75.0	29.2	3.1	12.0	0.3	6.7	0.5	0.0	0.2	23.9
April	349.1	344.1	4.9	0.0	0.2	1.6	0.0	0.2	1.7	129.5	75.0	29.2	3.1	11.4	0.3	6.7	0.5	0.0	0.2	24.0
Total Grains 1/																				
1988/89	1,563.5	1,359.3	204.2	35.7	17.2	164.1	15.2	106.3	183.8	298.0	148.0	32.7	18.2	18.5	16.0	40.0	21.4	16.6	25.2	202.6
1989/90 prel.	1,681.4	1,399.5	281.9	48.0	18.5	162.2	16.8	112.6	198.8	310.4	162.7	34.1	20.4	17.6	18.7	33.0	21.7	11.6	19.2	193.3
1990/91 proj.																				
March	1,764.4	1,454.3	310.0	57.8	20.4	159.1	18.3	106.6	223.7	330.7	159.6	34.5	20.3	16.0	21.9	34.3	23.0	8.2	23.1	196.8
April	1,765.2	1,455.2	310.0	57.8	20.4	159.0	18.6	107.2	223.7	330.0	159.6	34.5	20.4	15.4	22.4	34.0	23.0	9.1	23.1	197.1
Oilseeds 2/																				
1988/89	203.7	153.4	50.3	5.9	1.0	11.5	0.6	5.1	13.3	30.6	19.3	2.0	3.2	0.8	10.7	24.6	0.8	0.8	2.3	21.0
1989/90 prel.	214.3	155.0	59.2	4.9	1.4	11.0	0.7	6.0	14.0	28.5	19.4	2.0	3.3	0.9	15.9	21.8	2.4	1.0	2.3	19.6
1990/91 proj.																				
March	217.3	156.7	60.6	5.7	0.9	12.3	0.8	5.2	13.4	33.0	19.5	2.1	3.6	0.7	15.1	18.5	1.0	1.1	2.1	21.9
April	218.1	157.5	60.6	5.7	0.9	12.3	0.7	5.2	13.4	33.1	19.9	2.1	3.6	0.7	16.1	18.5	1.0	0.9	2.0	21.5
	—Million 480-Pound Bales—																			
Cotton																				
1988/89	84.7	69.3	15.4	0.0	1.4	1.6	0.0	0.1	12.7	19.1	8.3	0.0	6.5	0.2	0.9	3.4	1.3	0.4	3.0	10.5
1989/90 prel.	79.9	67.7	12.2	0.0	0.8	1.5	0.0	0.1	12.3	17.4	10.4	0.0	6.7	0.1	1.3	3.0	1.4	0.3	2.8	9.6
1990/91 proj.																				
March	87.6	72.0	15.6	0.0	0.8	1.5	0.0	0.1	12.0	20.5	9.8	0.0	7.3	0.1	1.4	3.4	1.6	0.2	3.0	10.3
April	87.0	71.5	15.5	0.0	0.8	1.5	0.0	0.1	12.0	20.5	9.6	0.0	7.5	0.1	1.4	3.2	1.6	0.2	3.0	10.1

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains and pulses are 195.1 million tons in 1988/89, 210.9 million in 1989/90, and 235.0 million forecast in 1990/91.

2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also include copra and palm kernels for all countries.

Note: Entries of 0.0 indicate no reported or insignificant production.

TABLE 3

Wheat Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1988/89	Prel. 1989/90	Proj. 1990/91	1988/89	Prel. 1989/90	1990/91 Mar.	Proj. Apr.	1988/89	Prel. 1989/90	1990/91 Mar.	Proj. Apr.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	218.0	225.5	230.3	2.30	2.38	2.55	2.56	500.4	537.0	589.0	590.1
United States	21.5	25.2	28.1	2.29	2.20	2.66	2.66	49.3	55.4	74.5	74.5
Total Foreign	196.5	200.3	202.2	2.30	2.40	2.54	2.55	451.1	481.6	514.5	515.6
Maj. Foreign Exporters	42.1	44.2	45.6	2.69	2.88	3.06	3.06	113.1	127.4	139.3	139.3
Argentina	4.7	5.5	5.9	1.79	1.86	1.90	1.90	8.4	10.2	11.2	11.2
Australia	8.9	8.9	9.9	1.58	1.58	1.59	1.59	14.1	14.1	15.7	15.7
Canada	13.0	13.6	14.1	1.23	1.80	2.26	2.26	16.0	24.6	31.8	31.8
EC-12	15.5	16.2	15.7	4.82	4.85	5.12	5.13	74.7	78.6	80.6	80.6
Major Importers	95.9	97.2	97.3	2.39	2.50	2.68	2.71	229.3	242.5	263.1	263.7
Brazil	3.5	3.4	2.7	1.68	1.65	0.97	1.16	5.8	5.6	3.2	3.1
China	28.8	29.8	30.3	2.97	3.04	3.18	3.18	85.4	90.8	96.5	96.5
Eastern Europe	10.7	10.6	10.7	4.17	4.16	4.17	4.21	44.8	44.3	44.8	45.2
Egypt	0.6	0.6	0.7	4.76	5.05	5.71	5.79	2.8	3.2	4.0	4.3
Other N. Africa 1/	4.0	4.7	5.1	1.26	1.13	1.08	1.11	5.0	5.3	5.6	5.6
Japan	0.3	0.3	0.3	3.62	3.47	3.66	3.66	1.0	1.0	1.0	1.0
USSR	48.1	47.7	47.5	1.76	1.94	2.27	2.27	84.4	92.3	108.0	108.0
Other Foreign	58.5	58.9	59.3	1.86	1.90	1.89	1.90	108.6	111.7	112.0	112.5
India	23.1	24.1	23.5	2.00	2.24	2.12	2.12	46.2	54.1	49.7	49.7
Iran	6.6	6.0	6.1	1.11	0.97	1.00	1.00	7.3	5.8	6.1	6.1
Mexico	0.8	1.0	0.9	4.00	4.21	4.59	4.59	3.2	4.0	3.9	3.9
Non-EC W. Europe	0.8	0.8	0.9	4.85	5.19	5.46	5.40	3.8	4.4	5.0	5.0
Pakistan	7.3	7.7	7.8	1.73	1.87	1.84	1.84	12.7	14.4	14.3	14.3
South Africa	2.0	1.8	1.7	1.78	1.11	1.00	1.00	3.5	2.0	1.7	1.7
Turkey	8.8	8.7	8.8	1.71	1.32	1.60	1.60	15.0	11.5	14.0	14.0
Others	9.3	8.8	9.8	1.83	1.76	1.81	1.83	17.0	15.4	17.4	17.9

1/ Algeria, Libya, Morocco, and Tunisia.

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TABLE 4

Coarse Grains Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1988/89	Prel. 1989/90	Proj. 1990/91	1988/89	Prel. 1989/90	1990/91 Proj. Mar.	1990/91 Proj. Apr.	1988/89	Prel. 1989/90	1990/91 Proj. Mar.	1990/91 Proj. Apr.
TOTAL COARSE GRAINS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World 1/	326.1	321.0	320.1	2.24	2.49	2.57	2.58	732.1	800.4	825.7	826.0
United States	32.8	37.0	36.4	4.56	5.98	6.34	6.34	149.7	221.4	230.6	230.6
Total Foreign	293.3	283.9	283.7	1.99	2.04	2.08	2.10	582.5	579.0	595.1	595.4
Maj. Foreign Exporters	20.7	21.3	20.9	2.47	2.47	2.61	2.64	51.1	52.6	53.6	55.1
Argentina	2.9	3.1	3.4	2.49	2.65	3.07	3.18	7.3	8.3	10.4	10.9
Australia	4.3	4.0	4.2	1.56	1.71	1.60	1.60	6.7	6.9	6.8	6.8
Canada	7.1	8.3	8.0	2.76	2.84	3.24	3.24	19.7	23.5	26.0	26.0
South Africa	4.6	4.4	3.6	2.86	2.20	1.88	2.04	13.0	9.6	6.5	7.4
Thailand	1.8	1.6	1.5	2.50	2.78	2.67	2.58	4.4	4.3	4.0	4.0
Major Importers	106.3	103.7	101.3	2.57	2.73	2.80	2.80	273.5	283.0	283.5	283.8
Eastern Europe	18.2	18.1	17.9	3.37	3.76	3.43	3.44	61.3	68.1	61.5	61.7
EC-12	19.2	18.6	17.6	4.60	4.43	4.35	4.37	88.1	82.3	76.9	76.8
Other W. Europe	3.2	3.1	3.0	3.52	3.97	4.40	4.46	11.4	12.4	13.3	13.6
Mexico	7.5	7.5	8.3	1.85	1.88	1.96	1.96	13.8	14.1	16.3	16.3
USSR	57.8	56.0	54.0	1.69	1.87	2.11	2.11	97.5	104.8	114.0	114.0
Other Major Import. 2/	0.5	0.4	0.4	3.40	3.35	3.31	3.31	1.5	1.4	1.4	1.4
Other Foreign	166.3	158.9	161.6	1.55	1.53	1.58	1.59	257.9	243.3	258.0	256.6
Brazil	13.4	12.5	13.5	2.00	1.79	1.80	1.79	26.7	22.5	24.4	24.2
China	28.3	28.2	28.7	3.33	3.31	3.59	3.62	94.2	93.5	104.7	104.0
India	38.7	37.7	38.9	0.81	0.92	0.90	0.90	31.3	34.6	35.0	35.0
Indonesia	2.9	2.7	2.9	1.82	1.85	1.83	1.83	5.2	5.0	5.3	5.3
Nigeria	10.1	9.9	9.7	0.84	0.82	0.78	0.78	8.5	8.1	7.6	7.6
Philippines	3.8	3.6	3.8	1.21	1.24	1.24	1.24	4.5	4.5	4.7	4.7
Turkey	4.4	4.4	4.5	2.29	1.70	1.99	1.99	10.0	7.5	8.9	8.9
Others	64.9	59.7	59.7	1.19	1.13	1.10	1.12	77.4	67.7	67.4	66.9
BARLEY											
World	78.2	74.8	73.2	2.15	2.27	2.43	2.48	167.8	169.6	181.5	181.5
United States	3.1	3.4	3.0	2.04	2.62	3.00	3.00	6.3	8.8	9.1	9.1
Total Foreign	75.1	71.5	70.1	2.15	2.25	2.41	2.46	161.5	160.8	172.4	172.4
Australia	2.2	2.4	2.5	1.48	1.73	1.59	1.59	3.3	4.1	4.0	4.0
Canada	4.2	4.7	4.6	2.46	2.50	2.93	2.93	10.2	11.7	13.5	13.5
China	3.7	3.3	3.3	1.67	1.74	1.73	1.73	6.2	5.7	5.7	5.7
Eastern Europe	4.5	4.5	4.5	3.78	4.31	4.33	4.35	17.1	19.3	19.6	19.7
EC-12	12.2	11.7	11.4	4.13	3.95	4.03	4.05	50.2	46.4	46.0	46.0
Other W. Europe	1.7	1.5	1.5	3.28	3.87	4.26	4.31	5.7	5.9	6.2	6.3
Turkey	3.3	3.4	3.4	2.12	1.46	1.76	1.76	7.0	4.9	6.0	6.0
USSR	29.7	27.6	26.0	1.50	1.75	2.19	2.19	44.5	48.5	57.0	57.0
Others	13.5	12.4	13.0	1.28	1.16	0.99	1.10	17.3	14.4	14.3	14.2

FOOTNOTES AT END OF TABLE

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1988/89	Prel. 1989/90	Proj. 1990/91	1988/89	Prel. 1989/90	1990/91 Proj. Mar.	Apr.	1988/89	Prel. 1989/90	1990/91 Proj. Mar.	Apr.
CORN	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	125.8	126.1	128.2	3.20	3.66	3.69	3.68	401.9	461.2	470.7	472.0
United States	23.6	26.2	27.1	5.31	7.30	7.44	7.44	125.2	191.2	201.5	201.5
Total Foreign	102.2	99.9	101.1	2.71	2.70	2.68	2.68	276.7	270.1	269.1	270.5
Maj. Foreign Exporters	7.1	6.7	6.4	3.05	2.72	2.77	2.87	21.6	18.2	16.9	18.2
Argentina	1.7	1.7	2.0	2.94	3.06	3.60	3.75	5.0	5.2	7.2	7.5
South Africa	3.8	3.6	3.0	3.28	2.47	2.14	2.33	12.4	8.9	6.0	7.0
Thailand	1.6	1.4	1.4	2.63	2.93	2.85	2.74	4.2	4.1	3.7	3.7
Major Importers	22.0	21.2	21.2	3.82	3.95	3.42	3.42	83.9	83.8	72.3	72.4
Eastern Europe	7.1	7.1	6.8	3.78	4.21	3.33	3.33	26.9	29.8	22.7	22.6
EC-12	4.1	3.9	3.4	7.00	6.91	6.27	6.26	28.5	26.8	21.6	21.6
Other W. Europe	0.2	0.2	0.2	8.55	7.68	7.43	7.91	1.9	1.7	1.6	1.8
Mexico	6.0	5.8	6.6	1.68	1.68	1.82	1.82	10.1	9.8	12.0	12.0
USSR	4.4	4.1	4.0	3.62	3.71	3.50	3.50	16.0	15.3	14.0	14.0
Other Maj. Import. 2/	0.1	0.1	0.1	4.20	4.19	4.14	4.14	0.4	0.5	0.5	0.5
Other Foreign	73.1	72.0	73.6	2.34	2.33	2.46	2.44	171.2	168.1	179.9	179.9
Brazil	12.9	12.1	13.0	2.02	1.80	1.81	1.81	26.1	21.8	23.5	23.5
Canada	1.0	1.0	1.0	5.47	6.36	7.00	7.00	5.4	6.4	7.0	7.0
China	19.7	20.4	21.0	3.93	3.88	4.19	4.19	77.4	78.9	88.0	88.0
Egypt	0.8	0.8	0.8	5.20	5.37	5.43	5.43	4.3	4.5	4.6	4.6
India	5.9	5.9	5.9	1.40	1.61	1.61	1.61	8.2	9.4	9.5	9.5
Indonesia	2.9	2.7	2.9	1.82	1.85	1.83	1.83	5.2	5.0	5.3	5.3
Philippines	3.8	3.6	3.8	1.21	1.24	1.24	1.24	4.5	4.5	4.7	4.7
Zimbabwe	1.2	1.2	1.1	1.56	1.69	1.81	1.52	1.9	1.9	1.9	1.6
Others	25.0	24.4	24.1	1.53	1.46	1.49	1.48	38.2	35.6	35.4	35.7
SORGHUM											
World	42.0	40.6	39.6	1.31	1.35	1.36	1.35	55.0	54.9	54.4	53.6
United States	3.7	4.5	3.7	4.00	3.48	3.95	3.95	14.6	15.6	14.5	14.5
Total Foreign	38.3	36.1	35.9	1.05	1.09	1.10	1.09	40.3	39.2	39.9	39.1
Argentina	0.6	0.7	0.8	2.33	2.86	3.29	3.33	1.4	2.0	2.3	2.5
Australia	0.6	0.4	0.5	1.99	2.27	2.00	1.99	1.3	0.9	0.9	0.9
China	1.8	1.6	1.6	3.14	2.72	3.22	3.35	5.6	4.4	5.8	5.2
India	14.6	14.9	15.0	0.70	0.86	0.83	0.83	10.2	12.9	12.5	12.5
Mexico	1.1	1.3	1.3	2.83	2.88	2.85	2.85	3.1	3.8	3.7	3.7
Nigeria	4.4	4.4	4.4	0.80	0.80	0.75	0.75	3.5	3.5	3.3	3.3
South Africa	0.3	0.2	0.1	1.58	1.47	1.30	0.78	0.4	0.4	0.2	0.1
Sudan	5.3	3.1	3.0	0.83	0.52	0.50	0.50	4.4	1.6	1.5	1.5
Thailand	0.2	0.2	0.2	1.35	1.44	1.39	1.39	0.2	0.2	0.3	0.3
Others	9.5	9.2	9.1	1.08	1.04	1.01	1.00	10.2	9.5	9.5	9.1

FOOTNOTES AT END OF TABLE

APRIL 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1988/89	Prel. 1989/90	Proj. 1990/91	1988/89	Prel. 1989/90	1990/91 Proj. Mar.	Apr.	1988/89	Prel. 1989/90	1990/91 Proj. Mar.	Apr.
OATS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	22.1	22.7	21.6	1.70	1.84	1.99	1.99	37.5	41.8	42.9	42.8
United States	2.2	2.8	2.4	1.41	1.95	2.16	2.16	3.2	5.4	5.2	5.2
Total Foreign	19.9	19.9	19.2	1.73	1.83	1.97	1.97	34.3	36.4	37.7	37.7
USSR	10.9	10.8	10.5	1.40	1.57	1.67	1.67	15.3	16.8	17.5	17.5
Maj. Foreign Exporters	3.5	3.7	3.5	1.91	1.97	2.12	2.12	6.6	7.3	7.4	7.4
Argentina	0.4	0.4	0.5	1.27	1.44	1.33	1.33	0.5	0.6	0.6	0.6
Australia	1.3	1.1	1.2	1.40	1.44	1.42	1.42	1.9	1.6	1.7	1.6
Canada	1.4	1.7	1.5	2.18	2.08	2.33	2.33	3.0	3.5	3.5	3.5
Sweden	0.4	0.4	0.4	3.14	3.54	4.51	4.51	1.3	1.5	1.6	1.6
Other Foreign	5.4	5.5	5.2	2.28	2.25	2.46	2.46	12.4	12.3	12.9	12.8
China	0.6	0.6	0.6	1.19	1.20	1.21	1.21	0.7	0.7	0.7	0.7
Eastern Europe	1.4	1.4	1.3	2.63	2.67	2.90	2.93	3.7	3.6	3.7	3.8
East Germany	0.1	0.1	0.1	3.43	3.33	4.14	4.14	0.5	0.5	0.6	0.6
Poland	0.9	0.8	0.7	2.61	2.72	2.78	2.84	2.2	2.2	2.1	2.1
EC-12	1.8	1.7	1.5	3.11	2.77	3.09	3.12	5.5	4.7	4.8	4.7
France	0.3	0.3	0.2	3.77	3.73	3.80	3.86	1.0	1.0	0.9	0.9
West Germany	0.6	0.5	0.5	4.23	3.78	4.37	4.59	2.4	1.9	2.1	2.1
Finland	0.4	0.4	0.5	2.21	3.24	3.67	3.67	0.9	1.4	1.7	1.7
Norway	0.1	0.1	0.1	3.02	3.13	4.58	4.58	0.4	0.4	0.6	0.6
Others	1.2	1.3	1.2	1.09	1.12	1.11	1.08	1.3	1.4	1.4	1.4
RYE											
World	15.9	16.9	16.8	2.08	2.22	2.31	2.31	33.0	37.6	38.8	38.9
United States	0.2	0.2	0.2	1.55	1.77	1.70	1.70	0.4	0.3	0.3	0.3
Total Foreign	15.6	16.7	16.7	2.09	2.23	2.32	2.32	32.6	37.3	38.6	38.6
USSR	10.1	10.7	10.5	1.83	1.87	2.00	2.00	18.5	20.1	21.0	21.0
Maj. Foreign Exporter											
Canada	0.3	0.5	0.5	1.04	1.74	1.74	1.74	0.3	0.9	0.9	0.9
Other Foreign											
Eastern Europe	3.9	3.9	4.1	2.59	2.99	2.91	2.92	10.0	11.8	11.9	12.0
East Germany	0.6	0.6	0.6	2.94	3.34	3.19	3.19	1.8	2.1	2.1	2.1
Poland	2.9	2.9	3.1	2.52	2.95	2.84	2.86	7.2	8.6	8.7	8.8
Czechoslovakia	0.2	0.2	0.2	3.42	4.05	4.26	4.26	0.5	0.7	0.7	0.7
EC-12	0.9	1.0	1.0	3.05	3.32	3.46	3.47	2.9	3.2	3.3	3.3
Denmark	0.1	0.1	0.1	4.52	4.80	4.90	4.90	0.4	0.5	0.5	0.5
West Germany	0.4	0.4	0.4	4.19	4.69	4.72	4.72	1.6	1.8	2.0	2.0
Others	0.5	0.6	0.6	2.06	2.29	2.51	2.50	1.0	1.3	1.4	1.4

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.
2/ Japan, Republic of Korea, and Taiwan.

APRIL 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 5

Rice Area, Yield, and Production
World and Selected Countries and Regions

	AREA			YIELD				PRODUCTION (Rough Basis)				MILLING RATE				PRODUCTION (Milled Basis)			
	1988/89	Prel. 1989/90	Proj. 1990/91	1988/89	Prel. 1989/90	1990/91 Proj. Mar.	Apr.	1988/89	Prel. 1989/90	1990/91 Proj. Mar.	Apr.	1988/89	Prel. 1989/90	1990/91 Proj. Mar.	Apr.	1988/89	Prel. 1989/90	1990/91 Proj. Mar.	Apr.
	—Million Hectares—			—Metric Tons Per Hectare—				—Million Metric Tons—				—In Percent—				—Million Metric Tons—			
World	145.5	146.5	146.8	3.4	3.5	3.5	3.5	488.9	508.2	516.8	515.7	67.7	67.7	67.7	67.7	330.9	344.0	349.7	349.1
United States	1.2	1.1	1.1	6.2	6.4	6.2	6.2	7.3	7.0	7.0	7.0	71.5	73.0	70.0	70.0	5.2	5.1	4.9	4.9
Total Foreign	144.3	145.4	145.7	3.3	3.4	3.5	3.5	481.7	501.2	509.7	508.7	67.6	67.6	67.6	67.5	325.7	338.9	344.8	344.1
Maj. Foreign Exporters	16.5	16.8	16.5	2.3	2.3	2.2	2.2	38.6	38.5	36.9	35.7	64.1	64.0	63.8	63.8	24.7	24.6	23.5	22.8
Burma	4.5	4.7	4.8	2.8	2.9	2.9	2.9	12.5	13.5	14.0	13.7	60.0	60.0	60.0	60.0	7.5	8.1	8.4	8.2
Pakistan	2.0	2.1	2.0	2.4	2.3	2.3	2.3	4.8	4.8	4.7	4.7	66.7	66.7	66.7	66.7	3.2	3.2	3.1	3.1
Thailand	9.9	10.0	9.7	2.1	2.0	1.9	1.8	21.3	20.2	18.2	17.3	66.0	66.0	66.0	66.0	14.0	13.3	12.0	11.4
Major Importers	13.0	13.8	13.7	4.3	4.2	4.3	4.3	55.8	58.3	58.5	58.5	66.1	66.0	66.0	66.0	36.9	38.5	38.6	38.6
EC-12	0.3	0.3	0.4	5.6	6.2	6.3	6.4	2.0	2.1	2.3	2.4	67.3	67.0	67.3	67.3	1.3	1.4	1.6	1.6
Indonesia	9.8	10.5	10.3	4.3	4.2	4.4	4.4	42.3	44.7	45.0	45.0	65.0	65.0	65.0	65.0	27.5	29.1	29.2	29.2
Nigeria	0.6	0.6	0.7	1.3	1.4	1.4	1.4	0.8	0.9	0.9	0.9	60.0	60.0	60.0	60.0	0.5	0.5	0.5	0.5
Republic of Korea	1.3	1.3	1.2	6.6	6.5	6.3	6.3	8.4	8.2	7.8	7.8	72.3	72.0	72.0	72.0	6.1	5.9	5.6	5.6
Other Maj. Import. 1/	1.0	1.0	1.1	2.3	2.4	2.3	2.3	2.3	2.5	2.5	2.5	65.4	65.5	65.5	65.5	1.5	1.6	1.6	1.6
Other Foreign	114.8	114.8	115.6	3.4	3.5	3.6	3.6	387.3	404.3	414.4	414.5	68.2	68.2	68.2	68.2	264.1	275.8	282.7	282.8
Australia	0.1	0.1	0.1	8.2	8.0	8.1	8.1	0.8	0.9	0.7	0.7	71.5	71.5	71.5	71.5	0.6	0.7	0.5	0.5
Bangladesh	10.2	10.5	10.6	2.3	2.6	2.6	2.6	23.3	27.0	27.2	27.2	66.7	66.7	66.7	66.7	15.6	18.0	18.1	18.1
Brazil	5.3	4.3	4.8	2.1	1.7	2.0	2.0	11.0	7.2	9.8	9.8	68.0	68.0	68.0	68.0	7.5	4.9	6.7	6.7
China	31.9	32.7	32.7	5.3	5.5	5.7	5.7	169.1	180.1	185.0	185.0	70.0	70.0	70.0	70.0	118.4	126.1	129.5	129.5
India	41.7	42.2	42.2	2.5	2.6	2.7	2.7	105.7	111.1	112.5	112.5	66.7	66.7	66.7	66.7	70.5	74.1	75.0	75.0
Japan	2.1	2.1	2.1	5.9	6.2	6.3	6.3	12.4	12.9	13.1	13.1	72.8	72.8	72.8	72.8	9.0	9.4	9.6	9.6
Philippines	3.5	3.4	3.5	2.6	2.6	2.7	2.7	9.2	8.9	9.4	9.4	65.0	65.0	65.0	65.0	6.0	5.8	6.1	6.1
USSR	0.7	0.7	0.7	4.3	3.9	4.0	4.0	2.9	2.6	2.6	2.6	65.0	65.0	65.0	65.0	1.9	1.7	1.7	1.7
Vietnam	5.8	5.9	5.9	2.9	3.1	3.1	3.1	16.8	18.4	18.0	18.0	65.0	65.0	65.0	65.0	10.9	12.0	11.7	11.7
Others	13.5	12.9	13.2	2.7	2.7	2.7	2.8	36.0	35.2	36.1	36.2	66.1	66.1	66.1	66.1	23.8	23.3	23.9	24.0

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

APRIL 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Mar.	Apr.	1988/89	1989/90	Mar.	Apr.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SOYBEANS											
World	55.87	58.04	54.54	1.71	1.85	1.91	1.92	95.55	107.12	104.53	104.80
United States	23.22	24.09	22.87	1.82	2.17	2.29	2.29	42.15	52.35	52.30	52.30
Total Foreign	32.65	33.94	31.67	1.64	1.61	1.64	1.66	53.40	54.76	52.23	52.49
Maj. Foreign Exporters	16.17	16.35	14.70	1.84	1.90	1.84	1.90	29.70	31.09	27.30	28.00
Argentina	4.00	4.95	4.80	1.63	2.17	2.10	2.29	6.50	10.75	10.30	11.00
Brazil	12.17	11.40	9.90	1.91	1.78	1.72	1.72	23.20	20.34	17.00	17.00
Other Foreign	16.48	17.59	16.97	1.44	1.35	1.46	1.44	23.70	23.67	24.93	24.49
Canada	0.53	0.54	0.50	2.16	2.26	2.63	2.63	1.15	1.22	1.33	1.33
China	8.12	8.06	7.50	1.43	1.27	1.51	1.52	11.65	10.23	11.50	11.40
Eastern Europe	0.56	0.54	0.54	1.20	1.51	1.31	1.31	0.67	0.82	0.71	0.71
EC-12	0.53	0.61	0.66	3.10	3.19	2.82	2.82	1.66	1.95	1.85	1.85
India	1.73	2.13	2.20	0.89	0.80	0.95	0.95	1.55	1.72	2.10	2.10
Indonesia	1.18	1.15	1.25	1.02	0.96	0.96	0.96	1.20	1.10	1.20	1.20
Paraguay	0.85	0.98	0.98	1.90	1.53	1.63	1.43	1.62	1.50	1.60	1.40
USSR	0.76	0.83	0.84	1.16	1.15	1.10	1.10	0.88	0.96	0.92	0.92
Others	2.21	2.75	2.50	1.51	1.52	1.48	1.43	3.33	4.19	3.72	3.58
COTTONSEED											
World	33.75	32.37	33.94	0.98	0.97	1.01	1.00	32.99	31.32	34.14	34.05
United States	4.84	3.86	4.74	1.14	1.10	1.17	1.17	5.50	4.24	5.52	5.52
Total Foreign	28.92	28.51	29.20	0.95	0.95	0.98	0.98	27.49	27.08	28.62	28.53
China	5.53	5.20	5.53	1.27	1.24	1.38	1.37	7.05	6.44	7.58	7.60
India	7.34	7.33	7.70	0.49	0.62	0.55	0.54	3.60	4.54	4.27	4.18
Pakistan	2.51	2.60	2.74	1.14	1.12	1.16	1.16	2.85	2.91	3.18	3.18
USSR	3.43	3.34	3.15	1.61	1.59	1.67	1.67	5.54	5.32	5.25	5.25
Others	10.10	10.04	10.08	0.84	0.78	0.83	0.83	8.44	7.87	8.35	8.33
PEANUTS											
World	19.81	19.65	19.37	1.17	1.12	1.10	1.11	23.18	21.93	21.40	21.58
United States	0.66	0.67	0.73	2.74	2.72	2.24	2.23	1.81	1.81	1.63	1.63
Total Foreign	19.15	18.98	18.64	1.12	1.06	1.06	1.07	21.37	20.12	19.77	19.94
Argentina	0.15	0.18	0.20	1.62	2.06	2.32	2.37	0.24	0.37	0.43	0.48
China	2.91	2.96	2.96	1.95	1.81	1.90	2.03	5.69	5.37	5.80	6.00
India	8.53	8.71	8.10	1.06	0.93	0.90	0.90	9.00	8.09	7.30	7.30
Senegal	0.90	0.78	0.92	0.76	1.04	0.73	0.73	0.69	0.82	0.67	0.67
South Africa	0.15	0.09	0.09	1.07	1.35	1.40	1.05	0.16	0.12	0.12	0.09
Sudan	0.58	0.55	0.54	0.78	0.73	0.60	0.60	0.45	0.40	0.33	0.33
Others	5.92	5.71	5.84	0.87	0.87	0.88	0.87	5.13	4.97	5.12	5.08

TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Mar.	Apr.	1988/89	1989/90	Mar.	Apr.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SUNFLOWERSEED											
World	14.95	15.91	15.90	1.36	1.39	1.34	1.37	20.37	22.04	21.67	21.77
United States	0.78	0.72	0.75	1.05	1.10	1.38	1.38	0.81	0.80	1.03	1.03
Total Foreign	14.18	15.18	15.15	1.38	1.40	1.34	1.37	19.56	21.24	20.64	20.74
Argentina	2.20	2.80	2.30	1.45	1.36	1.42	1.57	3.20	3.80	3.40	3.60
China	0.83	0.72	0.70	1.42	1.49	1.45	1.71	1.18	1.06	1.20	1.20
EC-12	2.16	2.11	2.55	1.84	1.66	1.60	1.60	3.99	3.50	4.08	4.08
East Europe	1.31	1.29	1.29	1.62	1.87	1.69	1.69	2.13	2.42	2.18	2.18
USSR	4.28	4.46	4.62	1.45	1.59	1.41	1.41	6.20	7.10	6.50	6.50
Others	3.39	3.81	3.69	0.84	0.88	0.88	0.86	2.87	3.36	3.28	3.18
RAPESEED											
World	17.85	17.18	18.47	1.27	1.27	1.39	1.38	22.71	21.88	24.93	25.40
Total Foreign	17.85	17.18	18.47	1.27	1.27	1.39	1.38	22.71	21.88	24.93	25.40
Canada	3.67	2.90	2.63	1.17	1.07	1.26	1.26	4.31	3.10	3.33	3.33
China	4.94	4.99	5.49	1.02	1.09	1.31	1.26	5.04	5.44	6.93	6.93
EC-12	1.84	1.66	1.97	2.81	2.96	2.92	2.92	5.17	4.92	5.73	5.73
East Europe	0.88	1.00	0.94	2.51	2.64	2.38	2.38	2.20	2.64	2.25	2.25
India	4.83	4.99	5.60	0.91	0.83	0.92	0.95	4.38	4.12	4.80	5.30
Others	1.69	1.63	1.84	0.95	1.02	1.03	1.01	1.61	1.67	1.90	1.87
FLAXSEED											
World	3.70	3.65	3.76	0.45	0.51	0.62	0.62	1.67	1.85	2.33	2.33
United States	0.09	0.07	0.10	0.45	0.47	0.95	0.95	0.04	0.03	0.10	0.10
Total Foreign	3.61	3.59	3.66	0.45	0.51	0.61	0.61	1.63	1.82	2.23	2.23
Argentina	0.54	0.58	0.58	0.86	0.90	0.83	0.83	0.46	0.52	0.48	0.48
Canada	0.50	0.60	0.73	0.74	0.83	1.29	1.29	0.37	0.50	0.94	0.94
India	1.20	1.18	1.20	0.30	0.29	0.33	0.33	0.36	0.34	0.40	0.40
USSR	1.04	0.87	0.78	0.21	0.26	0.21	0.21	0.22	0.23	0.17	0.17
Others	0.33	0.36	0.37	0.66	0.66	0.68	0.68	0.22	0.24	0.25	0.25
MAJOR OILSEEDS	*145.92*	*146.78*	*145.98*	*1.35*	*1.40*	*1.43*	*1.44*	*196.47*	*206.14*	*209.00*	*209.93*
United States	29.58	29.41	29.19	1.70	2.01	2.08	2.08	50.31	59.24	60.59	60.59
Total Foreign	116.34	117.37	116.79	1.26	1.25	1.27	1.28	146.16	146.91	148.42	149.34
COPRA	--	--	--	--	--	--	--	4.28	4.79	4.89	4.91
PALM KERNEL	--	--	--	--	--	--	--	2.94	3.34	3.42	3.30
TOTAL OILSEEDS	--	--	--	--	--	--	--	*203.69*	*214.27*	*217.31*	*218.13*
PALM OIL 1/	--	--	--	--	--	--	--	9.57	10.92	11.09	10.89

1/ Not included in total oilseeds.

APRIL 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 7

Cotton Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Mar.	Apr.	1988/89	1989/90	Mar.	Apr.
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	33.8	31.7	33.6	545	550	567	563	84.7	79.9	87.6	87.0
United States	4.8	3.9	4.7	694	688	718	711	15.4	12.2	15.6	15.5
Total Foreign	29.0	27.8	28.9	521	531	543	539	69.3	67.7	72.0	71.5
Maj. Foreign Exporters	13.5	13.1	13.2	749	728	779	781	46.5	43.7	47.3	47.5
Australia	0.2	0.2	0.3	1,475	1,406	1290	1,290	1.3	1.4	1.6	1.6
Central America 1/	0.1	0.1	0.1	830	834	807	807	0.4	0.3	0.3	0.3
China	5.5	5.2	5.5	751	728	812	807	19.1	17.4	20.5	20.5
Egypt	0.4	0.4	0.4	718	683	719	719	1.4	1.3	1.4	1.4
Mexico	0.3	0.2	0.2	1,209	891	913	913	1.4	0.8	0.8	0.8
Pakistan	2.5	2.6	2.7	568	560	580	596	6.5	6.7	7.3	7.5
Sudan	0.3	0.3	0.2	443	456	499	499	0.6	0.6	0.4	0.4
Turkey	0.7	0.7	0.7	882	851	976	976	3.0	2.8	3.0	3.0
USSR	3.4	3.3	3.2	805	805	827	827	12.7	12.3	12.0	12.0
Major Importers 2/	0.4	0.4	0.4	837	889	853	853	1.7	1.5	1.5	1.5
Other Foreign	15.0	14.4	15.3	306	342	330	321	21.1	22.5	23.1	22.5
Argentina	0.5	0.6	0.6	389	486	459	459	0.9	1.3	1.4	1.4
Brazil	2.4	1.9	2.1	311	347	353	332	3.4	3.0	3.4	3.2
India	7.3	7.3	7.7	245	310	277	271	8.3	10.4	9.8	9.6
Syria	0.2	0.2	0.2	667	930	907	977	0.5	0.7	0.7	0.7
Others	4.6	4.4	4.7	377	352	369	356	8.1	7.1	7.9	7.6

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

APRIL 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 8

The table below presents a 9-year record of the difference between the April projections and the final estimates. Using world wheat production as an example, changes between the April projection and the final estimate have averaged 2.6 million tons (0.5 percent) and ranged from -6.8 to 6.5 million tons. The April projection has been below the final 5 times and above the final 4 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 - 1989/90 1/					
	Difference		Lowest	Highest	Below	Above
	Average	Average	Difference		Final	Final
	Percent	---Million Metric Tons---			Number of Years 2/	
WHEAT						
World	0.5	2.6	-6.8	6.5	5	4
U.S.	0.1	0.0	-0.1	0.1	4	1
Foreign	0.6	2.6	-6.8	6.5	5	4
COARSE GRAINS 3/						
World	0.5	4.0	-7.1	4.3	6	3
U.S.	0.1	0.2	-0.2	1.3	5	1
Foreign	0.7	4.1	-7.1	4.3	6	3
RICE (Milled)						
World	1.3	4.1	-9.0	1.3	8	1
U.S.	1.2	0.1	-0.2	0.1	3	1
Foreign	1.4	4.1	-9.0	1.3	8	1
SOYBEANS						
World	1.7	1.6	-2.5	1.7	5	4
U.S.	1.3	0.7	-1.1	1.8	3	5
Foreign	2.4	1.0	-2.2	1.1	8	1
		---Million 480-lb. Bales---				
COTTON						
World	0.9	0.7	-3.0	0.1	7	2
U.S.	0.1	0.0	0.0	0.1	2	2
Foreign	1.1	0.7	-3.0	0.1	6	3
UNITED STATES		-------Million Bushels-------				
CORN	0.1	5	-8	38	1	1
SORGHUM	0.1	1	0	4	0	2
BARLEY	0.5	2	-3	11	5	1
OATS	0.1	0	-2	0	2	0

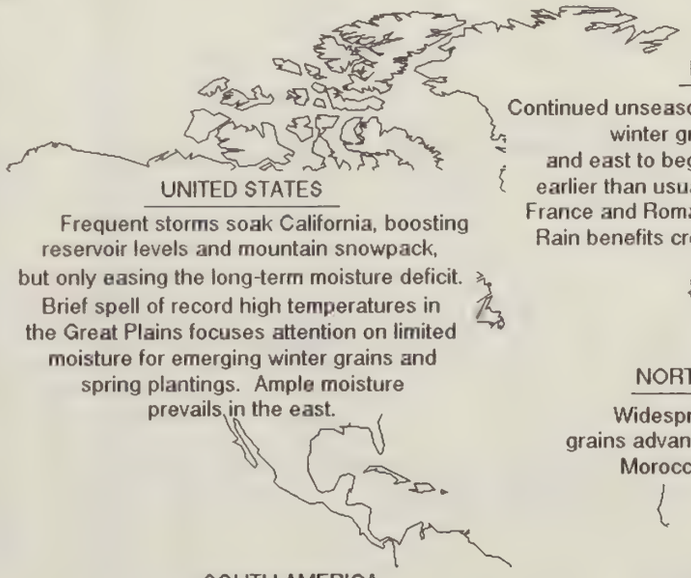
1/ The final estimate for 1981/82-1989/90 is defined as the first November estimate following the marketing year.
2/ May not total nine if projection was the same as the final.
3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

April 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

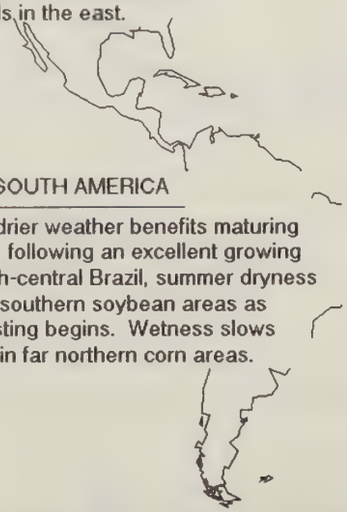
APRIL 10, 1991

NOAA/USDA JOINT AGRICULTURAL WEATHER FACILITY



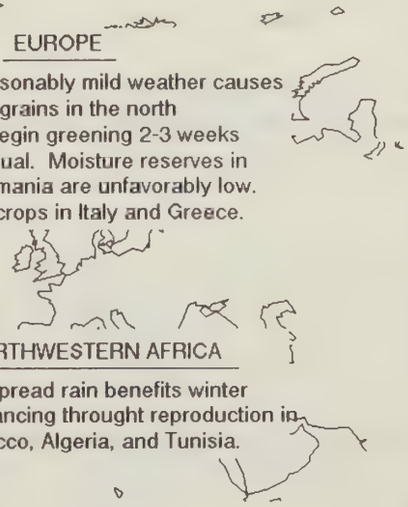
UNITED STATES

Frequent storms soak California, boosting reservoir levels and mountain snowpack, but only easing the long-term moisture deficit. Brief spell of record high temperatures in the Great Plains focuses attention on limited moisture for emerging winter grains and spring plantings. Ample moisture prevails in the east.



SOUTH AMERICA

In Argentina, drier weather benefits maturing summer crops, following an excellent growing season. In south-central Brazil, summer dryness persists in southern soybean areas as early harvesting begins. Wetness slows fieldwork in far northern corn areas.



EUROPE

Continued unseasonably mild weather causes winter grains in the north and east to begin greening 2-3 weeks earlier than usual. Moisture reserves in France and Romania are unfavorably low. Rain benefits crops in Italy and Greece.

NORTHWESTERN AFRICA

Widespread rain benefits winter grains advancing throught reproduction in Morocco, Algeria, and Tunisia.

SOUTH AFRICA

Showers through mid-March maintain generally favorable conditions for late planted corn in the western Maize Triangle. Drier, warmer weather in late March and early April favors crop growth and, in general, maturation fo crops planted on schedule. However, April 8, an early freeze likely causes local damage to immature corn in the west.

USSR

Generally mild, dry weather helps to condition soils for early season fieldwork. Winter grains are breaking dormancy around usual dates in good to excellent condition.

EASTERN ASIA

In southern China, widespread precipitation maintains mostly favorable moisture levels for spring crop planting, currently underway in southernmost areas. In the north, light to moderate showers are timely for vegetative growth of winter wheat. Periodic cold temperatures since mid March likely burn back some new growth.

SOUTHEAST ASIA

Lingering rains in Indonesia and Malaysia maintain mostly favorable irrigation reserves. Scattered showers begin over Thailand, but in general, most primary grain areas are too hot and dry for planting. In the Philippines, warm, dry weather in late March favors rice harvests. Showers in mid-March and early-April help local irrigation reserves but more widespread rain is needed for main season rice and corn planting.

AUSTRALIA

Generally dry weather in eastern summer crop areas hastens maturity. Near average March rainfall is confined mostly to Victoria's southern coast.

(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 447-7917.

WEATHER BRIEFS

ASIA: HEAVY MOUNTAIN SNOW LEVELS WILL AFFECT AGRICULTURE

Heavy snow pack in the mountains of south central Asia will likely have mixed effects on 1991/1992 crop production. Analysis of precipitation data and satellite imagery indicates that snow levels in this region, as of April 10, 1991, are at their highest levels since spring 1987. This region includes the mountains of northern Iran, Afghanistan, southern Soviet Central Asia, northwest China, northeast Pakistan and the Himalayas of Tibet, Nepal, and northern India. Runoff from melting snow this summer will provide abundant water for irrigated crops in Soviet Central Asia, Pakistan, and northern India. On the downside, there is potential for serious flooding along the Indus River of Pakistan and the Ganges and Brahmaputra Rivers of eastern India and Bangladesh. Satellite imagery analysis as of March 31, 1991, indicates reservoir levels in northern Pakistan. The intensity of flooding will be determined by river flow and reservoir management in Pakistan and the amount of spring and summer precipitation. In July and August of 1987, flooding was severe in Pakistan, eastern India, and Bangladesh. Mountain runoff, seasonal monsoon, and seasonal cyclonic storms combined to cause this flooding.

ROMANIA: DRYNESS CONTINUES

Dry conditions reported in the March World Agricultural Production circular continued for another month across Romania. Below normal precipitation continued during March 11 - April 9, 1991, with light amounts, about 10 millimeters (mm), just enough to settle the dust. The combination of last summer's drought and well below normal precipitation during the fall and winter depleted soil moisture reserves. Timely precipitation during the growing season will be needed for Romania to reach average crop yield levels.

SOUTH AFRICA: GREATLY IMPROVED FROM EARLY DROUGHT

Precipitation continued to be well timed and widespread across the Maize Triangle of South Africa in March 1991. Precipitation during March 10 - 23, 1991, was particularly heavy, with portions of the western Maize Triangle receiving close to 200 mm. March 24 - April 9, 1991 has been seasonably and favorably dry across the Maize Triangle. A greater than normal portion of the corn crop, particularly in the western Maize Triangle was planted late this season, well into January. Consequently a greater portion of the corn crop will mature at a later date than normal, increasing the risk of frost damage. On April 8, 1991, an early freeze likely caused some local damage in the west. Accumulation of enough "growing degree days" to mature the corn crop is becoming a major concern since days are becoming seasonably cooler and so much of the corn crop is late this year.

BRAZIL: NEW ORANGE CROP SAME AS CURRENT CROP

The 1991 Brazil orange crop is projected to be 240 million boxes (40.8 kilograms per box), the same as the 1990 crop but down 55 million from the record 1989 crop, according to the U.S. agricultural officer in Sao Paulo. Early prospects for the 1991/92 crop were expected to be about 300 million boxes, but unusual weather in November 1990 and "bloom blight" caused flowers to fall and early fruit did not set well, causing the estimate to fall to 200 million. However, since November the weather has been favorable and larger fruit size is expected to boost the current crop to last year's level. Sao Paulo accounts for all but about 45-50 million boxes of oranges produced in Brazil.

CANADA: 1991/92 PLANTED AREA FORECAST BY STATISTICS CANADA

According to Statistics Canada, wheat area in 1991/92 is forecast to fall 4 percent below last year's near record level. Oats, barley, canola, corn, and soybeans seedings are forecast higher for 1991/92. Little change is estimated in durum wheat and flaxseed area. The estimates of seeding intentions are based on a telephone survey of 10,000 farmers during the period February 25 to March 1. Over the past 10 years, these estimates have been within 4 percent of the final seeded area. However, this year the forecasts were made before farmers had sufficient time to study the Canadian Government's new Gross Revenue Insurance Plan and the Net Income Stabilization Account programs. As a result, farmers indicated that their planting intentions may change. USDA will make its initial 1991/92 Canadian production, supply, and demand estimates for grains in May and oilseeds in July.

Canadian 1991/92 Planted Area
Compared to Harvested Area Estimates

Year	Wheat	Barley	Corn	Oats	Canola	Soybean	Flaxseed
	Million Hectares						
1991/92 1/	13.6	4.8	1.1	1.7	2.9	0.6	0.7
1990/91 2/	14.1	4.6	1.0	1.5	2.6	0.5	0.7
1989/90 2/	13.6	4.7	1.0	1.7	2.9	0.5	0.6

1/ Statistics Canada planted area forecast.
2/ USDA estimated harvested area.

CHINA: COTTON PRODUCTION SURPASSES EXPECTATIONS

The Chinese Government's preliminary official estimate for the 1990/91 cotton crop is 4.47 million tons (20.5 million 480-pound bales), well above earlier unofficial estimates. The official estimate reflects unusually mild weather conditions throughout the fall of 1990 which contributed to cotton yields that were higher than anticipated. Although official provincial estimates will not be available until late April or May, preliminary estimates show major production increases in the provinces of Henan, Hebei, Hubei, and especially Xinjiang, where cotton output was 50 percent higher than last year. Some provinces experienced less-than-favorable growing conditions, however. A series of typhoons in late summer caused significant crop losses in Jiangsu, while heavy rain and flooding hurt cotton yields in Shandong.

COLOMBIA: MORE MEAT AND LESS EGGS IN 1990

Colombian poultry meat output in 1990 is estimated at 298,000 tons, 3 percent above 1989 but still below the record 1988 production of 309,000 tons. The large production in 1988 caused a sharp drop in prices (after adjusting for inflation) which so far have not fully recovered. Output may increase slightly in 1991 as prices in recent months have improved at the same pace as inflation. Egg output in 1990 is estimated at 4.7 billion eggs, down 5 percent, as prices (adjusted for inflation) fell. Somewhat higher prices and a 4-percent increase in production are forecast for 1991.

ISRAEL: CITRUS PRODUCTION DOWN FOR 1990/91

Total Israeli citrus production for 1990/91 is forecast at 1.24 million tons, down 11 percent from last year and 12 percent from the December 1990 estimate. The decrease is a result of dry weather and disruptions in picking due to the Gulf War. Orange production is down 90,000 tons to 700,000, grapefruit is reduced 18,000 tons to 380,000, and tangerines have declined 34,000 tons to 100,000. Dry weather is also expected to impact the 1991/1992 crop since rainfall has only been 50 to 60 percent of normal in 1991 and irrigation quotas are expected to be cut -- up to 60 percent in some areas.

MEXICO: STRAWBERRY AREA DECLINES

Mexico's 1990/91 fresh strawberry crop is forecast at 111,000 tons, down 2 percent from last season. Growing conditions have been generally favorable, but area is down due to lower returns for strawberries and the higher costs of financing production. In peso terms, production costs are up over 50 percent while the March wholesale price was up only 5 percent. Cold weather in mid-December caused some frost damage but not enough to compromise quality. Some producers considered the net effect to be beneficial, since the frost-retarded disease and insect infestations and helped boost farmgate prices.

Production of frozen strawberries is expected to decline about 2 percent to 48,000 tons, in line with the decline in fresh production. Rising domestic sugar prices are adversely affecting the price competitiveness of Mexican frozen strawberries in international markets.

Mexico: Strawberries, Fresh and Frozen

Year	Area Harvested	Yield	Fresh Production	Frozen Production
	(Hectares)	(Tons/hectare)	(Metric tons)	(Metric tons)
1970/71	6,903	14.98	103,440	N/A
1971/72	5,682	15.53	88,228	N/A
1972/73	6,661	15.72	104,684	N/A
1973/74	6,339	16.24	102,958	N/A
1974/75	5,328	16.44	87,618	N/A
1975/76	5,684	15.71	89,321	N/A
1976/77	5,529	15.98	88,327	N/A
1977/78	5,709	15.50	88,502	N/A
1978/79	5,340	16.38	87,450	N/A
1979/80	5,200	15.94	82,900	N/A
1980/81	4,400	17.50	77,000	38,000
1981/82	3,900	16.33	63,700	37,300
1982/83	3,800	20.24	76,900	33,000
1983/84	4,200	22.02	92,500	40,000
1984/85	3,500	19.00	66,500	25,554
1985/86	4,000	17.00	68,000	28,052
1986/87	4,750	19.14	90,900	39,753
1987/88	5,600	20.00	112,000	51,408
1988/89	6,000	16.00	96,000	30,000
1989/90	6,300	18.00	113,400	49,000
1990/91 1/	6,200	17.90	111,000	48,000

1/ Preliminary.

SOVIET GRAIN PRODUCERS FACE CHALLENGING SPRING SCHEDULE

As the spring sowing season approaches, the Soviet press has been filled with reports describing problems faced by state and collective farms. Some of the problems have a familiar ring: inadequate preparation, machinery out of service, and shortages of material. More disturbing, however, from the standpoint of Soviet grain producers, are the difficulties that have resulted from last fall's delayed harvest. Wet weather late in the crop season, combined with record grain yields, placed unusual strain on equipment and manpower during the 1990 harvest. The delay in completion of the harvest led to a sharp reduction from year-earlier levels in the planting of winter crops and fall plowing. Farmers now face, with reduced resources, a spring sowing campaign of unusual proportions.

Soviet officials have announced a preliminary 1991/92 winter grain area of 31.1 million hectares, compared to 34.4 million hectares the previous year. Although it is uncertain how much of this decline can be directly attributed to delays in the 1990 harvest, the reduction in winter grain sown area was unexpected. The decrease in winter grain area will most likely increase spring barley area, thus placing an extra load on the spring work schedule. An even greater task, however, will be completing the plowing unfinished from last fall. In a typical year, about 120 million hectares are plowed in the fall in preparation for spring crop seeding. By the end of 1990, 20 million hectares

remained unplowed; this land will have to be cultivated prior to planting the spring crop. Soviet analysts estimate that the amount of spring field work will increase by 25 percent this year. Some areas of the the non-chernozem region of the Russian republic, land has been prepared for only one-quarter of the spring crops.

THAILAND: HOG SLAUGHTER ROSE IN 1990

Hog slaughter increased 4 percent in 1990 to 7.25 million head. A somewhat higher rate of increase had been expected, but the rise was limited because of hot weather during March and April, flooding in October, an outbreak of foot-and-mouth disease, and declining prices. A sharp price decline was partially offset by lower feed costs which allowed profit margins to remain positive. Pork output for 1991 is expected to increase 1 to 2 percent.

INDIA SOYBEAN PRODUCTION, SITUATION, AND OUTLOOK

Soybean production in India has registered rapid growth over the past decade, with production increasing 425 percent to an estimated 2.1 million tons in 1990/91. Soybean area also expanded significantly, increasing 450 percent to an estimated 2.2 million hectares in 1990/91. This phenomenal performance was achieved despite serious cultivation and management handicaps, with the focus of soybean development centered primarily in the State of Madhya Pradesh. Soybeans are now the third largest oilseed crop in India, behind peanuts and rapeseed. Further gains in soybean production are expected, but it will be difficult to sustain the robust growth rate of the last decade. Constraints limiting future growth include declining availability of land, advantages of higher oil-content oilseeds in an edible oil-deficit country, and the difficulty of obtaining substantial additional yield increases.

HISTORICAL BACKGROUND

Cultivation of soybeans for meal and oil use is relatively recent in Indian agricultural history, although black varieties of soybeans called "kali tur" have been grown in some parts of the country since time immemorial. A concerted effort to increase soybean production was initiated in the mid-1960's with the active involvement of United States Agency for International Development (USAID). Under the USAID program, Indian agricultural scientists were trained at the University of Illinois in soybean cultivation, while several U.S. soybean experts visited India. In fact, the Bragg and Clark varieties of soybeans from the United States formed the corner stone of soybean variety development in India. Due to the lack of marketing facilities and other infrastructural problems, soybean cultivation did not take off until the late 1970's.

A combination of factors in the late seventies and early eighties triggered large-scale commercial cultivation of soybeans. The Government of India (GOI) began to focus attention on boosting production of nontraditional oilseeds to help reduce India's level of vegetable oil imports. Cooperative Oilseed Federations were established to provide better price incentives to farmers cultivating nontraditional oilseeds and a nationwide support price was established for soybeans in 1976. In addition, significant growth in soybean processing capacity in the central Indian State of Madhya Pradesh provided a ready market and favorable atmosphere for the growth of soybean cultivation there. The Madhya Pradesh State government also provided cheap credit and various tax incentives to the private and cooperative sectors to set up soybean processing plants, which resulted in a mushrooming of soybean processing units in the State. The current processing capacity is around 3.0 million tons and still growing.

High domestic prices for vegetable oils, good export demand for soymeal, and a 10 percent export subsidy on oilmeal enabled the soybean processors to make a profit. Private processors and the cooperatives pushed up prices in competition for limited soybean supplies from the domestic market. In the drought year of 1987/88, soybean prices soared to a record level of 8,500 rapees (US$ 445) per ton. During the 1990/91 peak market season, processors were offering farmers prices ranging from 5,500-6,000 Rs. (US$ 290-315) per ton.

INSTITUTIONAL SUPPORT

In 1967, the Indian Council of Agricultural Research (ICAR) launched an All India Coordinated Research Project on soybeans, with headquarters in Pant Nagar in Uttar Pradesh. The project was inter-disciplinary and had multiple research sites throughout India. Several improved soybean varieties were developed under this project. However, to provide a sound research base for long-range soybean development, a National Research Center for Soybean was established in 1987 at the city of Indore in the heart of the soybean belt in Madhya Pradesh. This center has a mandate to conduct basic research in breeding improved soybean varieties and the standardization of related cultivation practices which are suited to different agro-climatic conditions. The center also serves as a repository of soybean germ plasm and breeder seeds of national varieties.

An Oilseed Technology Mission (OTM) was set up by the Government in 1986 with the goal of making India self-sufficient in vegetable oil production. The OTM is basically a consortium of different government agencies concerned with oilseed and vegetable oil production, processing, imports, and distribution. Its aim was to develop an integrated crop production technology and support system for farmers. The integrated system was to supply growers with crop inputs, to improve post-harvest technology, to provide strong price support to farmers, and to provide fiscal and technological support to the processing industry.

The National Dairy Development Board (NDDB), a national quasi-governmental milk cooperative located in Anand, Gujarat, also became involved with oilseed development a few years ago. Using funds generated by the sale of P.L. 480 soybean oil from the United States and donated rapeseed oil from Canada, the NDDB assisted various states to set up Oilseed Cooperative Federations for the integrated development of production, procurement, processing, and marketing of oilseeds and vegetable oils. In the private sector, the Soybean Processors' Association of India (SOPA) is providing technical and extension support to soybean farmers.

SOYBEAN CULTIVATION

In India, soybeans are mainly grown in the "kharif" or summer monsoon season. They are planted in June and harvested in October. The State of Madhya Pradesh accounts for nearly 80 percent of the the country's soybean production and the Malwa region in the western part of the State is the major producing area. Other significant soybean growing States are Uttar Pradesh, Rajasthan, and Maharashtra.

The recent growth in soybean cultivation occurred in regions where large areas of land traditionally lay fallow during the kharif season due to a lack of irrigation to compensate for uneven rains and a suitable crop to fit into the existing cropping pattern. Farmers in the soybean growing region previously cultivated a single crop of wheat or chickpeas during the winter or "rabi" growing season, utilizing the stored soil moisture reserves accumulated during the summer monsoon period. In recent years, soybean farmers began cultivating the summer fallow area in this region, as well as some land devoted to kharif planted sorghum and millet. This displacement of summer coarse grain production has accounted for up to one-third of the soybean harvested area, or 700,000 hectares.

The Madhya Pradesh State government's current policy is to prevent the diversion of any more grain, pulse, or alternative oilseed crop area with soybeans. This policy will directly constrain future expansion in soybean cultivation in this important region. In the Malwa region, there is now little opportunity to increase soybean area without replacing other crops like sorghum or pigeon peas, since nearly the entire fallow area has been brought under soybean cultivation. However, in eastern Madhya Pradesh there is some opportunity for soybean cultivation if low yielding upland rice areas are converted. Eastern States such as Bihar, Orissa, and Andhra Pradesh also show potential for increased soybean area. It is estimated that total soybean area could reach 3.0 million hectares in the near future, based on an average annual increase of 70,000 hectares in Madhya Pradesh and 20,000 hectares in Maharashtra, Rajasthan, and Gujarat. The accompanying map shows the current and potential soybean production areas in India.

While most of the recent growth in Indian soybean production is due to increased harvested area, national yields have also improved significantly. In the current 1990/91 growing season, soybean yields are forecast at a record 0.96 tons per hectare, up from 0.6 tons a decade ago. In the past, the majority of soybean's sown were of the black "kali tur" variety, but higher prices and better yields encouraged farmers to shift to yellow varieties. High yields were achieved in the mid-1970's, but on a limited area. As soybean area was significantly expanded during the 1980's, average yields declined. New varieties were developed from a domestic breeding program suited to different agro-climatic regions and yields are now as high as they have ever been. India currently has some 46 varieties of soybeans, the most popular include Bragg, Clark-63, Durga, Gaurav, MACS-13, MACS-58, and various JS varieties.

Experimental fields have recorded yields as high as 2.5 tons per hectare, although maximum attainable yield at the farmers level is estimated at only 2.0 tons. Given various input and infrastructural constraints, it is estimated that the nationwide average yield is unlikely to exceed 1.2 tons per hectare by the year 2000, although certain areas could exceed 1.5 tons.

CONSTRAINTS TO GROWTH

Factors which are likely to constrain future production increases include: (a) a shortage of high yielding seed varieties and lower prices; (b) non-availability of suitable rhizobium culture; (c) possibility of a large-scale pest or disease infestation; (d) over dependence on the export market for soymeal; (e) vulnerability to drought due to lack of assured irrigation, and (f) limited use of modern inputs.

Although various research institutes and universities have developed several high yielding varieties of soybean, good quality seeds are generally in short supply and are expensive. Private seed companies are not yet engaged in soybean seed production and farmers are not willing to pay a higher price for high-yielding variety (HYV) seed. Farmers mainly sow seed stored from the previous years crop. Current farm level seed replacement rate is only about 8 percent. Pod shattering and poor germination rates continue to be problems.

Commercial production of rhizobium culture is very limited and of poor quality. The Madhya Pradesh Oilseed Cooperative Federation is producing some rhizobium culture which is supplied to its farmer members. To date, the Indian soybean crop has not suffered any major damage due to disease or pest infestations. However, as larger areas are cultivated and the practice of using fewer major soybean varieties intensifies, there is a greater threat that pest or disease damage could become significant. The homogeneous character of the crop could result in significant damage from a pest or disease outbreak by quickly spreading through the entire soybean belt.

Most of the present soybean growing area is not irrigated. Favorable rainfall during the past 3 years has helped promote record crop yields. This region is historically plagued by inconsistent or deficient summer rainfall. In this respect, if moisture stress occurs during critical soybean growth stages in future crops, significant yield reductions could occur. Average yields during a severe drought in the 1987/88 growing season dropped to around 0.6 tons per hectare. In addition, use of fertilizers and agrochemicals for soybean production is very limited and unlikely to increase due to its rising cost. Optimum yields, such as those achieved at the research stations, are unlikely without increased use of appropriate inputs.

Soybean prices may be subject to decline if the world supply and demand of oilseed meals reduces international soybean meal prices. Indian processors are currently in a position to pay high prices to soybean growers due to both a strong demand for soymeal in the world market and high domestic prices for vegetable oils. In recent years, India's rising soybean oil prices have more than offset the drop in the export price for soybean meal. Since processors export virtually all of the meal, a sharp decline in world meal prices would squeeze profit margins of inefficient processors. This situation combined with lower domestic vegetable oil prices would lead to lower producer prices for soybeans. The termination of special rupee payment agreements with several East European countries like Poland and Czechoslovakia, and the Government's decision to curb switch deals for soymeal moving via the Soviet Union to hard currency markets, have altered the traditional export channels and may result in lower export prices.

FUTURE OUTLOOK

While there is potential for increased soybean production in India, it is likely to proceed at a more moderate pace during the 1990's. An annual increase in planted area of 3.5 to 4.0 percent through the year 2000 is clearly within India's capability. Combining this area with an annual increase of 2.0 to 2.5 percent in yield implies that Indian soybean production could reach 3.6 million tons by the year 2000. This outlook represents a dramatic deceleration in the expansion of planted area and a slower increase in average yield.

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This article is based on a report by the staff of the USDA Agricultural Counselor's office, New Delhi, India in March, 1991.

TABLE 9

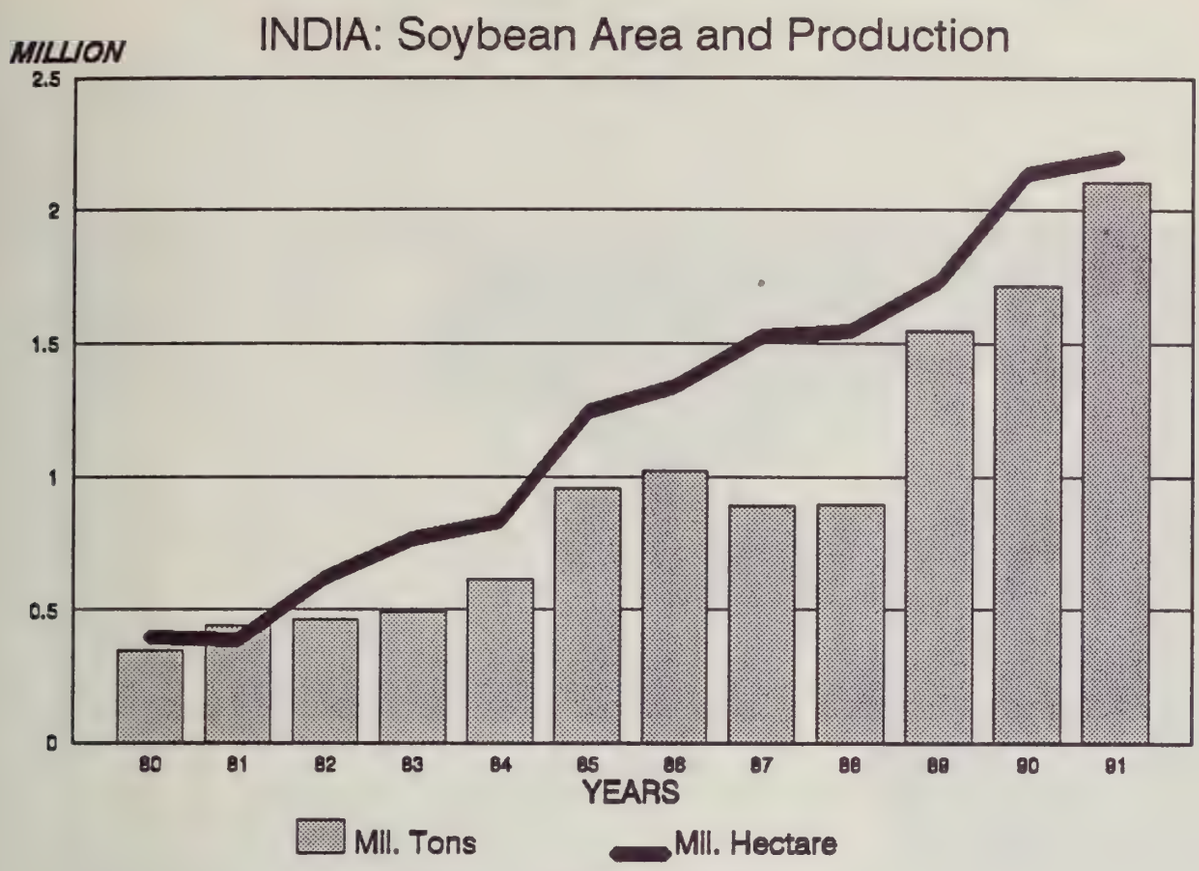
INDIA: Soybean Area and Production Estimates by State

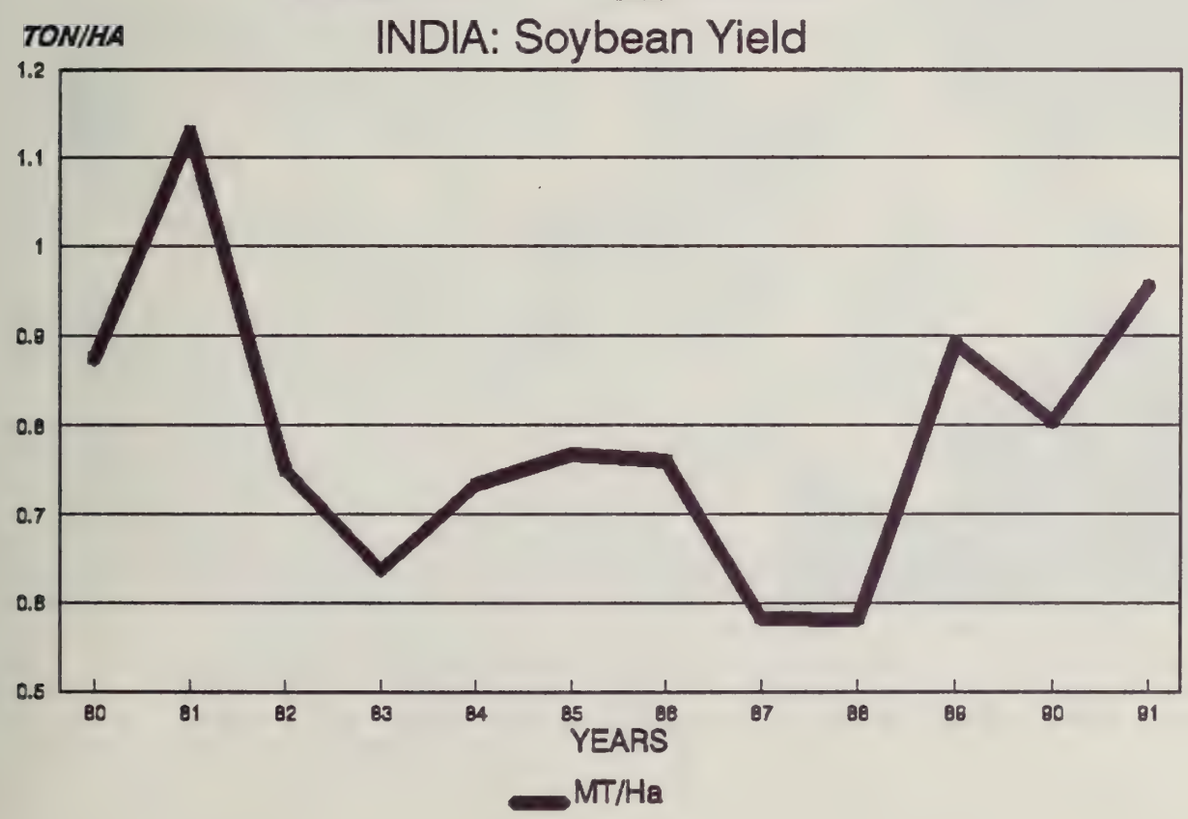
(Area in Thousand Hectares; Production in Thousand Tons; Yield in Kg/Ha)

	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91
Gujarat											
Area	11.0	11.0	11.0	11.0	11.0	1.2	22.4	10.2	16.5	22.9	25.0
Yield	409.1	409.1	409.1	409.1	409.1	833.2	267.9	303.9	745.9	834.1	800.0
Prod	4.5	4.5	4.5	4.5	4.5	1.0	6.0	3.1	12.3	19.1	20.0
Madhya Pradesh											
Area	454.8	307.3	584.1	613.8	986.6	1,096.5	1,209.6	1,329.4	1,475.8	1,755.4	1,800.0
Yield	769.6	765.1	613.9	752.0	780.1	756.0	560.0	577.0	890.0	802.0	972.2
Prod	350.0	235.1	358.6	461.6	769.6	829.0	677.4	767.1	1,313.4	1,407.8	1,750.0
Maharashtra											
Area	0.0	0.0	0.0	0.0	0.0	0.0	54.6	76.7	87.0	126.9	140.0
Yield	0.0	0.0	0.0	0.0	0.0	0.0	362.6	320.7	646.0	788.8	928.6
Prod	0.0	0.0	0.0	0.0	0.0	0.0	19.8	24.6	56.2	100.1	130.0
Rajasthan											
Area	4.8	9.8	11.7	22.6	30.5	42.7	52.0	84.0	106.5	169.0	170.0
Yield	520.8	663.3	538.5	690.3	855.7	744.7	753.8	733.3	1,154.9	800.0	882.4
Prod	2.5	6.5	6.3	15.6	26.1	31.8	39.2	61.6	123.0	135.2	150.0
Uttar Pradesh											
Area	135.0	141.2	157.2	181.7	207.0	192.0	167.4	18.0	15.9	21.3	25.0
Yield	622.2	721.0	746.8	701.2	715.0	802.1	809.4	1,033.3	1,314.5	1,328.6	1,200.0
Prod	84.0	101.8	117.4	127.4	148.0	154.0	135.5	18.6	20.9	28.3	30.0
Other States											
Area	2.0	5.3	6.2	7.1	7.6	7.3	20.8	24.3	32.4	38.8	40.0
Yield	600.0	698.1	677.4	732.4	868.4	1,137.0	649.0	958.8	657.4	621.1	500.0
Prod	1.2	3.7	4.2	5.2	6.6	8.3	13.5	23.3	21.3	24.1	20.0
Total India											
Area	607.6	474.6	770.2	836.2	1,242.7	1,339.7	1,526.8	1,542.6	1,734.1	2,134.3	2,200.0
Yield	727.8	740.8	637.5	734.6	768.3	764.4	583.8	582.3	892.2	803.4	954.5
Prod	442.2	351.6	491.0	614.3	954.8	1,024.1	891.4	898.3	1,547.1	1,714.6	2,100.0

Note: Official India statistics through 1989/90. 1990/91 is Agricultural Counselor Office Estimate

CHART 1


INDIA: Soybean Area and Production
MILLION
2.5
2
1.5
1
0.5
0
80
81
82
83
84
85
86
87
88
89
90
91
YEARS
Mil. Tons
Mil. Hectare


INDIA: Soybean Yield
TON/HA
1.2
1.1
1
0.9
0.8
0.7
0.6
0.5
80
81
82
83
84
85
86
87
88
89
90
91
YEARS
MT/Ha

MAP 2

Jammu and Kashmir
Punjab
Haryana
Delhi
Rajasthan
Uttar Pradesh
Bihar
West Bengal
Assam
Tripura
Madhya Pradesh
Andhra Pradesh
Tamil Nadu
Kerala
ARABIAN
SEA
BAY
OF
BENGAL
Cultivated
Potential Area
INDIA
SOYBEAN GROWING REGION

1991 WINTER GRAIN PROSPECTS IN THE NORTHERN HEMISPHERE OUTSIDE THE UNITED STATES

SUMMARY: Winter grains account for roughly one-third of the world total wheat and coarse grain output. Winter grain production prospects in the Northern Hemisphere outside the United States are generally favorable, particularly in South Asia, north Africa, and the Soviet Union. A mild winter and adequate soil moisture in most of Europe and the USSR have allowed early spring field work and reports indicate that the winter grains crop is 2-3 weeks ahead of normal development. Dry weather has been a problem in some areas of Western Europe, mainly central France, and in the Balkan region of Eastern Europe. Although bitterly cold weather moved into western areas of the USSR and Europe in late-January and early February, only below average to average winterkill is anticipated. The sharp reduction in Soviet winter grains area is expected to more than offset small increases in planted area in the EC, northwest Africa, India, China, Turkey, and Mexico.

Western Europe: Generally, fall and winter weather throughout Europe was mostly favorable. Mild temperatures and adequate precipitation have resulted in good to very good conditions for winter grains crops across the region. Little or no winterkill has been reported despite an isolated cold snap that gripped Europe from late January into early February. Winter grains broke dormancy about 2-3 weeks earlier than usual due to unseasonably warm weather. The EC area set aside program will have little impact on grain area. Germany is a strong advocate of the program, but farmers in the other member states have shown less interest.

- **France:** Winter soft wheat sowings for 1991 are estimated up 3 percent from a year earlier and durum area is up 13 percent. Winter barley plantings, however, are expected to be 1 percent lower. The winter grains area rise is partially attributed to a drop in rapeseed area and the conversion of pasture land to grain production. Although northern and central France has continued to be drier than normal, winter grains still retain the potential for favorable yields assuming normal spring rainfall.

- **United Kingdom:** There has been a continued shift from the production of spring to winter varieties of wheat, with emphasis on higher yielding feed varieties. However, total wheat area is expected to be down 2 percent due to increases in rapeseed and flax area as well as land moved into the set aside program. Winter barley sowings are continuing to increase over spring barley (58 percent to 42 percent) since winter barley has higher yields and is preferred by U.K. maltsters. The winter grain crops were planted under generally excellent conditions and weather has been favorable for their establishment.

- **Italy:** Winter wheat area is reported to be 1 percent lower than last year; depressed prices are causing the farmers to shift their land into corn production or into the set aside program. Soft wheat is estimated 3 percent lower than last year while durum wheat area is seen virtually unchanged. During the last 10 years, the area sown to bread wheat dropped by one-third and this trend is not likely to change in the near future. The winter has been generally favorable and minimal winterkill has been reported.

- **West Germany:** Winter wheat plantings are estimated to be unchanged from the previous year although winter barley sowings are down 5 percent. A high profit margin is seen maintaining wheat area, while the reduction in barley area is attributed to the set aside program. Winter rye area is seen falling by 8 percent because average yields lag behind other grains. Farmers fear the elimination of the special markup on the bread rye intervention price. Bitterly cold temperatures in February apparently did not significantly harm winter crops and there are no indications of the yellow dwarf virus that infested crops last year.

- **Spain/Portugal:** Winter grains are expected to rebound from last year's levels as wheat area is reported to be up 14 percent. Winter wheat and barley in Portugal is expected to return to the levels of 2 years ago after 1989/90's severe winter reduced the area harvested; rye and oats also are up sharply. Spain's barley area is reported to be down marginally, but wheat is up 8 percent. Despite a dry fall in Spain and rather wet fall in Portugal, weather has improved and has increased yield potential.

- **Belgium/Luxembourg:** Winter grains area is virtually unchanged from last year. Wheat area is continuing to increase (up 2 percent from last year) at the expense of barley area (down 4 percent from 1990/91). Favorable weather has been reported throughout the growing season.

- **Denmark:** Winter grains plantings are estimated to be 6 percent higher this year. Winter wheat sowings are up, although somewhat lower than initially anticipated due to heavy rains that caused some field losses. The last few years of mild winters and no winterkill have encouraged farmers to sharply increase the area under winter barley. Winter crops are developing satisfactorily under generally favorable growing conditions.

- **Greece:** Winter grains plantings are reported to be up 4 percent this year. The area planted to soft wheat varieties continues the downward trend of the last 5 years as area is being switched to more profitable field crops. However, the area devoted to durum has increased as a result of attractive EC incentives. Barley area is seen lower in 1991/92 as low yields and better returns from other crops depress sown area. Late fall planting conditions were excellent with November/December rains dramatically improving soil moisture.

EASTERN EUROPE: The winter in Eastern Europe has generally been warmer and drier than normal. Eastern Europe experienced a cold snap in late January and early February that may have caused some damage in areas lacking adequate snow cover. Sown area is estimated to have increased in most of the countries but low soil moisture levels in much of the region, particularly in the south, may temper yield prospects. However, the soil moisture deficit could impact summer grains more than winter grains without normal-to-above-normal spring and summer rainfall. The move to a market economy in East European nations is changing agricultural subsidies and costs and has had a negative impact in several countries relative to fertilizer use and seed quality.

- **Poland:** Generally, winter grains are in good condition, though signs of nitrogen deficiencies have been sighted, suggesting insufficient top dressing. Prices for mineral fertilizers and plant protection chemicals have increased and, as a result, usage rates have declined. Mild temperatures and plentiful precipitation improved crop conditions prior to winter dormancy. Continued favorable winter precipitation has boosted soil moisture levels and adequate snow cover helped protect wintering grains from the cold snap in late January and early February.

- **Czechoslovakia:** Soil moisture levels are generally favorable despite last year's summer drought and dry fall planting conditions. The mild winter has been beneficial to wintering grains and winterkill is reportedly at a minimum.

- **Romania:** The outlook for winter grains is less than favorable due to poor germination, poor soil moisture, and inadequate fuel supplies. Following a very dry fall and winter, normal-to-above-normal precipitation is now required to boost yield prospects.

- **Yugoslavia:** The outlook for the winter grains is somewhat mixed at this time as planting conditions were average but most of the seeding was late. The effects of low temperatures at the end of January and the beginning of February are considered to have had a negligible effect on winter grains. Although planted area is up from last year, changes in governmental policy and the economy had a negative impact on the use of fertilizers and the quality of seed sown last autumn.

USSR: For the third consecutive year, the major winter grain producing areas have experienced a milder-than-normal winter. Fall sowing was delayed in the more northern areas due to delays in harvesting the spring and summer crops and prolonged wet conditions. The final sowing progress report indicated winter grains were sown on only 31.1 million hectares compared to 34.4 million in 1989, down 3.3 million. Fall plowing of land to be planted to spring crops was behind 1989 by nearly 20 million hectares. In addition to making up for last fall's shortfall in plowing, other serious concerns voiced in the Soviet press include expected shortages in fertilizer, plant protectants, fuel, tractors, spare parts, and supplies of acceptable seed stocks.

Winterkill is expected to be slightly more than last year but still below the long-term average. Soviet press reports expressed concern over the potential adverse impact from an episode of bitter cold in early February along with a shallow snow cover in the western Central Region, parts of the Black Soils Region, Belorussia, and the western Ukraine. Moisture accumulations for the fall and winter (September-February) were slightly above normal for most areas, although March precipitation was light in the Ukraine and lower Volga regions.

Since March 1, continued unseasonably warm weather has diminished snow cover 2-3 weeks earlier than usual over the major winter wheat producing areas of the Ukraine, Black Soils Region, and the North Caucasus. Although winter grains remain dormant in most areas, some greening-up may have occurred by late March in the southwestern Ukraine and the western North Caucasus. Currently, prospects for winter grains are good to excellent, although the area is reduced.

NORTHWEST AFRICA

- **Morocco:** Winter grain planting, which usually begins in November, was delayed until mid-December due to inadequate early-season rainfall. Conditions have improved significantly in the wheat areas of northern and northwestern Morocco, with abundant rainfall aiding crop prospects. Rainfall remained inadequate until mid-February in the southern winter grain areas, affecting mainly barley. Planted area is estimated to have increased from last year as a result of high domestic market prices at the time of sowing. Higher durum wheat prices also have led to increased durum plantings. Soft wheat planted area experienced a decline, but existing favorable growing conditions have lead to good yield potential.

- **Tunisia:** Abundant and well distributed rainfall during November provided favorable conditions for early crop establishment in barley and wheat growing regions. Winter grains are planted from October to December, with harvest beginning in May. The area planted to barley in 1991/92 is estimated above last year's levels. Wheat area is estimated near record levels while favorable winter and spring precipitation has increased yield prospects.

- **Algeria:** Winter wheat and barley planting traditionally coincide with the onset of the rainy season in mid-November. Planting of the 1991/92 winter grain crop began early due to the occurrence of favorable September precipitation. Abundant and well distributed rainfall continued throughout the planting season, providing favorable conditions for early crop establishment. Planted area is estimated to have increased over last year's below-average level. Yield prospects remain favorable.

ASIA

- **India:** Fall planting conditions for winter grains were nearly ideal this year across the northern half of India, encompassing the greatest part of the winter wheat belt. A very successful summer monsoon left wheat zone soil profiles fully charged with moisture at planting, boosting early crop establishment. The current growing season's weather is nearly the opposite of last year, with a wet beginning followed by 4 months of seasonably dry and clear conditions. Favorable winter weather is expected to spur grain yields in the irrigated northwest states and in the rainfed region of western Madhya Pradesh. As of late March, the heavily irrigated northwest portion of the wheat belt is in the grain fill stage while the remainder of central and east India are beginning harvesting operations. Wheat area is forecast up 4 percent from last year.

- **Pakistan:** Autumn planting conditions were dry in northern Pakistan's wheat zone owing to below-normal rainfall in October and November. Wheat yields were expected to be affected by lower fertilizer usage, as subsidies and imports were reduced. However, the current winter grain outlook is very favorable due to adequate irrigation supplies and timely winter rainfall during December and March. Winter grain establishment has been excellent, including the rainfed or "barani" growing zone north of the Jhelum river in Punjab. The barani zone is typically a swing production sector relying heavily on winter precipitation. Conditions near optimum for the growth of grains in dryland regions have enhanced yield potential. Wheat area is estimated to be virtually unchanged from last year.

- **Bangladesh:** Autumn planting conditions were near optimal this year, with excellent post-monsoon soil moisture reserves aiding early crop establishment. Winter rainfall also played a key role in maintaining crop vigor prior to reproductive growth. Thus, this year's wheat crop has the potential to show a significant improvement in yield over last year's rain damaged harvest. The current crop outlook is favorable with wheat area forecast unchanged from last year.

- **China:** Weather conditions for China's winter grain crop have been favorable for the third year in a row. Soil moisture levels were adequate during 1990 fall planting and above-normal temperatures encouraged strong crop development prior to dormancy. Most grain areas received moderate amounts of rain and snow during the normally dry winter, while temperatures were as much as 3 degrees Celsius above normal in January and February. Although the mild winter weather reduced the threat of winterkill, there is some concern that it could lead to pest and disease problems this spring. Current weather conditions are very good between the Yangtze and Yellow Rivers in northern China where the majority of the winter grain crop is grown. A drought was reported in the grain area north of the Yellow River last winter but widespread rain during March has improved the situation. In contrast, unusually heavy spring rain has caused some localized flooding and possible crop damage in the Yangtze River valley.

  China's total winter grain planted area is estimated to have increased slightly above last year's level to more than 30 million hectares as farmers responded to favorable sowing conditions and the announcement of a generous State 'protection' or guaranteed minimum purchase price for the 1991/92 wheat crop. Most of the area increase came from an expansion of intercropping and double cropping in the southern wheat-growing provinces.

MIDDLE EAST: Except for Turkey, most of the Middle East is expected to produce average or lower-than-average winter grain crops for 1991/92 due to inadequate precipitation. Planted area, however, is estimated to have increased slightly in the region this year.

- **Israel:** Despite recent rains, the lack of precipitation during the rainy season caused late germination and consequent poor development for winter grains and further increased the long-term precipitation deficit. The Government's restrictions on water usage for irrigation has caused a decrease in fodder production; some of the stunted winter grain crop may be used for livestock feed.

- **Jordan:** Precipitation in Jordan during the fall of 1990 and early 1991 was less than average for the third consecutive year. Accordingly, prospects for agriculture output in 1991 are only average despite recent rains.

- **Saudi Arabia:** Wheat production is again expected to be in excess of domestic needs although barley production is expected to increase slightly due to official support. The guaranteed producer price for barley however, remains much less than that for wheat. All winter grains are irrigated.

- **Syria:** The rainy season, beginning in October, has been dry and may have adversely affected the mostly rainfed Syrian crop. However, recent timely rains have improved the outlook for 1991/92 wheat and barley crops. Increased prices of fertilizers and especially pesticides has restricted their use. However, the seasonal precipitation shortfall is viewed as the greatest threat to prospective Syrian winter grain production.

- **Turkey:** Near-ideal weather has benefited winter grains, and wheat planted area has increased slightly over last year. Continued favorable weather in April and May will be needed to maintain current crop prospects, particularly in the southeast growing region.

NORTH AMERICA

- **Canada:** Winter wheat plantings are down 30 percent from last year. Winter wheat in Ontario, which accounts for 40 percent of the winter wheat, declined 34 percent from 1990/91. The decrease from the record 1990/91 level can be attributed to poor prices and the late harvest of soybeans which prevented winter wheat sowings (winter wheat normally follows soybeans). Winter wheat area comprises about 3 percent of the total wheat area.

- **Mexico:** Winter wheat area is estimated above last year due to adequate reservoir levels in the central growing region and in the primary growing States of Sonora and Sinaloa. Flooding in Sinaloa and Sonora occurred during late December, 1990, but damage to planted wheat appears to be minimal and no freeze damage has been reported. Producers were likely encouraged to plant more wheat due to higher wheat prices during the winter crop planting period.

Note: The initial forecast of wheat and coarse grain area, yield, and production for the 1991/92 year will appear in the May edition of the World Agricultural Production report.

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FIELD TRIP REPORT FOR ARGENTINE SUMMER CROPS

Foreign Agriculture Service personnel traveled through the major summer crop regions in Argentina during March of 1991. Argentine soybeans, corn, sorghum, sunflower, peanut, and cotton crops were assessed in Buenos Aires, Santa Fe, Cordoba, and Chaco provinces. Overall, summer crops are in good to excellent condition throughout the visited region. This assessment is supported by satellite image analysis indicating the best summer crop yields since 1985/86. Assessment and discussions with government and private industry agronomists and economists revealed the following information.

SOYBEANS -- Soybean production is forecast at a record 11.0 million tons for the 1990/91 crop, up 2 percent from 1989/90, due to above-average yields. Favorable weather at planting and throughout the summer has increased the yield potential by 6 percent over last year. There are more second season soybeans this year; these traditionally follow wheat. Timely rainfall, well placed throughout the season, has benefited both first-and second-crop soybeans. Yields are more dependent on weed control and management practices because water and soil moisture are adequate this year. Farmers and Government officials in the regions visited mentioned that herbicides are expensive and are not cost effective to apply.

In mid-March, soybeans are at the pod-setting to pod-filling stage in the main soybean belt of southern Santa Fe, northern Buenos Aires, and eastern Cordoba. Harvest is a month away for first-season soybeans and 2 months away for second-season soybeans. Area declined by 3 percent from last year's record area due to regional increases in peanuts and cotton and a marginal increase in corn in the corn soybean belt. Government officials and farmers indicated that planting decisions were based on cost-competitiveness assessments between soybeans and other crops.

CORN -- Near-record corn yields are estimated for 1990/91, 23 percent higher than last year's yields due to favorable weather and timely rains. Production is estimated at 7.5 million tons, up 44 percent from 1989/90. Corn is at dry-down in Santa Fe, Cordoba, and northern Buenos Aires and some harvesting has begun. Farmers visited in this region are pleased of their higher yielding corn. Estimated corn area increased slightly from 1989/90. Much of this increase was planted on better soils as in the Junin district of northern Buenos Aires. Corn is considered more profitable than soybeans when planted on high-yielding soils. Very few insect and disease problems were observed and there was good kernel development.

SORGHUM -- The potential for above-average sorghum yields in 1990/91 are a result of favorable weather. Production is estimated at 2.5 million tons for 1990/91. Harvest is underway in Cordoba and will begin soon in Buenos Aires and La Pampa. Area estimates increased slightly from last year despite lower profitability. Farmers and government officials indicated that grain sorghum is used in a rotation with peanuts and soybeans in Cordoba province and is used to improve soil structure in Santa Fe.

SUNFLOWER -- Sunflower yields in 1990/91 are forecast at a record level because of favorable weather throughout the growing season. Production is estimated at 3.6 million tons, 5 percent less than in 1989/90. Harvest is nearly complete in Chaco, Santa Fe, and Cordoba. Harvest is just beginning in Buenos Aires, the main producing province. Sunflowers in northern Buenos Aires ranged from flowering to maturity. Area declined by 18 percent due to poor results of last year's crop and competitiveness of cotton in Chaco.

PEANUTS -- Peanut yields are estimated higher than those of a year ago as a result of favorable weather. Production is estimated at 475,000 tons, an increase of 28 percent over 1989/90. Peanuts will be harvested by the end of the April for the majority of the crop, especially the runner varieties. Harvesting of colorados or redskin peanuts is occurring now. Farmers in the region visited said they prefer the runner varieties because of higher yields and better quality. Cordoba province produces nearly all of Argentina's peanuts. Area increased because the price relationship favored peanuts over soybeans, despite the higher management costs required for peanuts.

COTTON -- Cotton production is estimated at a record 294,000 tons (1.35 million bales) or a 6 percent increase from 1989/90. Harvesting of cotton began in January and will continue through June. Most of the harvest is done by hand. Higher quality cotton is harvested first and the quality deteriorates as the season progresses. Farmers and government officials stressed the importance of early maturing varieties for higher quality cotton. Ideal harvesting conditions were evident during field travel. Chaco and Formosa Provinces produce the majority of Argentine cotton. Planted area increased by 12 percent due to higher international prices and poor competition from sunflowers and soybeans. Late October flooding in Chaco province in 1990 necessitated replanting of some lower lying cotton and sunflower areas. Cotton replanting was finished by mid-December. Cotton yields vary widely and are dependent on planting time, variety, weather, and management practices.

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TABLE 10

Argentine Grains, Oilseeds, and Cotton

	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91
AREA HARVESTED (1,000 hectares)											
Corn	3,394	3,170	2,970	3,024	3,340	3,351	2,900	2,600	1,700	1,700	2,000
Sorghum	2,100	2,510	2,520	2,370	1,965	1,400	1,100	1,000	600	700	750
Soybean	1,740	1,986	2,281	2,910	3,270	3,316	3,510	4,260	4,000	4,950	4,800
Sunflower	1,280	1,673	1,902	1,989	2,350	3,046	1,800	2,058	2,200	2,800	2,300
Peanut	197	166	125	146	143	168	233	192	150	180	200
Cotton	300	399	360	470	447	320	330	515	501	565	640
YIELD (metric tons per hectare)											
Corn	3.80	3.03	3.03	3.14	3.56	3.70	3.19	3.46	2.94	3.06	3.75
Sorghum	3.38	3.19	3.02	2.91	3.16	3.00	2.82	3.00	2.33	2.86	3.33
Soybean	2.01	2.09	1.84	2.41	2.06	2.20	1.99	2.28	1.63	2.17	2.29
Sunflower	0.98	1.18	1.26	1.11	1.45	1.35	1.39	1.36	1.45	1.36	1.57
Peanut	1.23	1.63	2.00	2.25	1.89	2.61	2.22	2.34	1.62	2.06	2.38
Cotton	0.28	0.38	0.31	0.38	0.38	0.37	0.32	0.55	0.39	0.49	0.46
PRODUCTION (1,000 metric tons)											
Corn	12,900	9,600	9,000	9,500	11,900	12,400	9,250	9,000	5,000	5,200	7,500
Sorghum	7,100	8,000	7,600	6,900	6,200	4,200	3,100	3,000	1,400	2,000	2,500
Soybean	3,500	4,150	4,200	7,000	6,750	7,300	7,000	9,700	6,500	10,750	11,000
Sunflower	1,260	1,980	2,400	2,200	3,400	4,100	2,500	2,800	3,200	3,800	3,600
Peanut	243	270	250	329	270	439	518	450	243	370	475
Cotton	85	153	112	180	171	119	105	282	195	277	294

APRIL 1991

Production Estimates and Crop Assessment Division, FAS, USDA

INDONESIA: LIVESTOCK SECTOR DEVELOPMENTS

Indonesia's livestock industry, though small, has shown steady growth during the past 5 years. The poultry sector has shown especially rapid growth. Very low per capita meat consumption levels and favorable economic growth patterns have given demand a strong boost. Despite the rapid growth of poultry meat and egg output, domestic consumption of animal protein in Indonesia is still well below the nutrient standard of 4.5 grams of animal protein per capita per day. This is mainly due to the limited production and relatively high prices of livestock products. The purpose of this article is to present recent growth patterns of Indonesian livestock production and to discuss certain aspects of future growth prospects.

Indonesia's mid-1990 population of 183 million, about 70 percent of which is rural, is the fifth largest in the world and a high percentage of the people live at the subsistence level. Per capita gross domestic product (GDP) measured in U.S. dollar terms is about $530 annually. Although rural land ownership averages only 0.5 hectare per family, the agricultural sector accounts for about one-fifth of the GDP in Indonesia and employs about half the country's labor force. Relative to agricultural policy, the Government is committed to increasing the production of food crops, estate crops, and other agricultural commodities for both domestic use and exports. Goals specifically for livestock, include development of poultry and livestock subsectors for domestic consumption and export markets, and expansion of agricultural processing industries, as well as continued rapid growth of export fisheries.

Basic statistical information on Indonesia's livestock industry are shown in the following tables. Over the period shown, cattle and sheep numbers have grown at moderate rates, swine and layers numbers grew by roughly 50 percent while, broiler numbers tripled.

Two factors that could cause an acceleration in growth include changes in government policy and improved export opportunities. On the policy side, a May 1990 ruling that relaxed enterprise size maximums should stimulate development of larger, more efficient units. These maximums were established with the expressed purpose of encouraging small holder production. Enforcement has been rather limited and mainly directed at poultry producers. The new (as of May 28, 1990) maximum sizes for poultry and livestock small holder's farms are listed below.

Type of Farms	Maximum Number of Livestock
Layers	10,000 hens
Broilers	15,000 head production/cycle
Swine	125 head
Beef Cattle	100 head
Dairy Cattle	20 head

According to the decree, farms which operate above this size are considered as large livestock companies, and for layer and broiler operations, must export at least 65 percent of their production. Previously, the Government limited the size of a broiler operation to 750 birds per week, and a layer flock to 5,000 birds.

Another policy change that should stimulate production is a Government program to encourage vertical integration called "KINAK" which was launched in late 1990. This plan encourages small farms to establish formal links with large firms to ensure the availability of technology, capital, and production inputs and to assist in marketing products. Further, a 1989 deregulation measure allowing free trade in corn should help stabilize prices and ensure adequate supplies for the poultry industry.

Opportunities for exports largely stem from Indonesia's proximity to rapidly developing Asian markets, particularly Singapore. Much of the recent growth in the swine sector has been the development of large modern farms that ship to Singapore. A large private company has been studying the feasibility of establishing a poultry farm which could produce around 200 million birds per year in Lomba and Bulan islands, Riau (Sumatra). The initial phase plans on around 50 million birds per year, with marketing of poultry and eggs focused on Singapore, Taiwan, Japan, and Batam island. Another Indonesian private company recently established a joint-venture feedlot operation with an Australian company in Lampung (Sumatra). It is reported that they will start importing cattle from Australia later this year, and will eventually have a production goal of 36,000 head of beef cattle per year. Around 60 percent of the production is reportedly targeted for export to Malaysia, Singapore, Brunei, and Middle East. Two other private companies are also interested in feedlot operations in Lampung. It is reported that these three ventures are planning to eventually produce a total of around 70,000-75,000 head per year.

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TABLE 11

INDONESIA: LIVESTOCK NUMBERS
(Million head)

Year	Beef 1/ Cattle	Dairy Cattle	Sheep & Goats	Swine	Village Chicken	Broilers	Layers
1984	9.24	0.20	13.73	5.11	167	111	30
1985	9.32	0.21	14,52	5.56	156	144	32
1986	9.43	0.22	16.02	6.22	163	174	39
1987	9.51	0.23	15,75	6.34	168	218	40
1988 2/	9.78	0.24	16.44	6.48	183	227	38
1989 3/	10.04	0.25	16.81	7.05	187	285	41
1990 4/	10.30	0.25	17.15	7.65	190	346	44

TABLE 12

INDONESIA: MEAT, MILK, AND EGG PRODUCTION
(1,000 MT)

Year	Beef 5/	Mutton 6/	Pork	Poultry	Milk	Hen Eggs
1984	265	77	119	280	179	273
1985	276	79	133	318	192	292
1986	277	94	164	343	220	321
1987	280	94	141	382	235	330
1988 2/	288	93	142	403	265	352
1989 3/	296	95	145	425	300	369
1990 4/	304	97	148	448	340	386

1/ Does not include buffalo. 2/ Revised figures. 3/ Estimated figures. 4/ Office of Agricultural Affairs estimate. 5/ Includes buffalo meat. 6/ Includes goats.

Source: Directorate General for Livestock

WORLD PINEAPPLE PRODUCTION

World pineapple production during 1991 is forecast at 4.7 million tons, essentially unchanged from 1990. Output in Thailand and the Philippines, the two largest producers, is forecast to be about the same as 1990. Pineapple production in Africa is forecast to be about 6 percent above the 1990 level as planted area increased after last year's downturn.

A fourth year of dry weather in the Philippines has caused the pineapple estimate to remain at 1.15 million tons. Output in 1990 was 1.16 million tons, down from a peak of 1.3 million reached in 1987. The effect of the dry weather has been compounded by higher costs for fertilizers and other production related chemicals. Is should be noted that efforts by the Philippine government to validate its statistical information on pineapples resulted in a significant downward revision in the production series for all years since 1980.

In Thailand, pineapple production is estimated at 1.5 million tons. Little rainfall since November 1990 is affecting the early 1991, crop, resulting in lower-than-normal yields and an increased number of small fruit. Thai pineapple production normally fluctuates between 1.4 million and 1.9 million tons as a result of weather and domestic prices. Prices are currently reported to be the highest in decades but the weather problems are likely to keep yields below the reduced levels of 1990. Thai farmers are reported to be using various techniques to move their harvest outside the normal April-May and October-November harvesting periods. Canneries are willing to pay higher prices for these "offseason" deliveries.

Taiwan's 1991 production is forecast at 240,000 tons, 3-percent above 1990. Prices are generally favorable as the domestic market for fresh pineapple continues to expand. Following a 3 percent decline in 1990, Malaysian pineapple production is forecast at 225,000 tons in 1991 a 7 percent increase. Both area and yield are expected to be higher. In addition, a more favorable outlook for exports to Japan has created optimism in the industry and the Malaysian Government is now looking at the possibility of expanding pineapple cultivation to other areas of the country.

Pineapple production in Cote d'Ivoire increased in 1990 and is forecast to increase again in 1991. The industry seems to have fully adjusted to the breakup of the country's sole pineapple cooperative, COFRUITEL, in 1986. That breakup and consequent loss of credit facilities forced many small producers to leave the industry. The increasing domination of the industry by large producers is expected to lead to increased quality and productivity and increased stability of production. After declining in 1990, Kenya's pineapple production is set for a major recovery in 1991. Favorable weather during the growing season is expected to result in higher yields. In addition, a trend in the industry to replant after the first ratoon crop rather than the second has tended to raise the national yield. South African production is forecast at 210,000 tons in 1991, 7 percent above 1990 when drought and poor prices hurt the crop.

Australian output in 1991 is forecast at 155,000 tons, 9 percent above the 1990 crop. Weather patterns in 1990 caused too much of the crop to ripen at the same time with the result that a portion of the crop was left to rot in the fields and another portion was rejected by the processing plant because it was overripe.

Mexico's pineapple crop is forecast at 333,000 tons, slightly above last year. Small growers in Mexico are facing a financial squeeze as sources of credit become less available and production costs continue to rise. Some sources claim that credit availability for small farmers is down over 50 percent as compared to 1990. Pineapple production in the United States is tentatively forecast to decline again as a significant block of pineapple land is converted to nonagricultural uses.

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TABLE 13

FRESH PINEAPPLE: PRODUCTION IN SELECTED COUNTRIES
(1,000 metric tons)

Year	Australia	Cote d'Ivoire	Kenya	Malaysia	Mexico	Philippines	South Africa	Taiwan	Thailand	Total Foreign	United States	TOTAL
1970	128.0	110.6		283.2	248.8	365.0	160.5	338.2	242.5	1,876.9	865.5	2,742.3
1971	128.0	135.7		268.2	297.3	380.0	173.5	358.5	124.8	1,866.1	854.6	2,720.7
1972	126.0	201.3		255.4	218.2	375.0	174.0	334.4	318.8	2,003.1	859.1	2,862.2
1973	126.0	201.0		241.5	268.3	333.2	147.4	328.0	483.5	2,128.9	734.8	2,863.8
1974	119.8	229.0		245.3	397.8	405.0	184.2	307.9	803.7	2,692.7	635.0	3,327.7
1975	95.5	240.0		199.3	371.3	400.0	169.4	319.0	1,151.9	2,946.3	653.2	3,599.4
1976	119.0	267.0		194.4	442.0	752.0	172.3	278.8	1,295.9	3,521.4	616.9	4,138.3
1977	101.0	242.0		191.8	510.0	780.0	158.8	282.2	1,499.4	3,765.3	626.0	4,391.2
1978	103.0	312.0		190.3	568.3	815.0	167.3	249.6	1,540.0	3,945.6	612.4	4,557.9
1979	133.0	287.0		192.6	632.1	875.0	212.1	244.8	1,372.0	3,948.6	617.8	4,566.4
1980	123.3	303.0		176.1	604.6	901.0	221.9	228.8	1,673.0	4,231.7	596.0	4,827.7
1981	123.4	306.7		153.6	550.0	972.5	242.7	181.0	1,824.1	4,354.0	577.0	4,931.0
1982	125.5	233.4		188.3	440.0	1,009.8	244.1	144.9	1,439.3	3,825.2	607.8	4,433.1
1983	111.3	181.5		183.4	250.0	967.0	209.6	115.2	1,465.8	3,483.7	655.0	4,138.7
1984	115.1	227.6	168.0	174.5	260.0	1,035.7	184.3	123.6	1,472.5	3,761.3	544.3	4,305.6
1985	124.5	294.8	167.0	182.4	325.0	1,030.0	247.6	149.7	1,768.9	4,289.9	512.6	4,802.5
1986	155.0	280.5	231.3	174.1	292.5	1,273.2	247.9	157.9	1,635.7	4,448.1	586.0	5,034.1
1987	165.0	269.1	210.0	178.5	306.0	1,303.4	267.4	193.3	1,510.0	4,402.7	627.8	5,030.4
1988	168.3	216.4	190.5	194.5	247.5	1,181.2	264.8	228.1	1,690.5	4,381.9	597.8	4,979.7
1989	146.0	187.7	212.3	216.1	324.0	1,178.8	262.2	230.7	1,732.0	4,489.9	526.2	5,016.1
1990	142.0	193.3	202.4	209.8	328.0	1,156.0	196.5	233.5	1,512.0	4,173.5	521.6	4,695.1
1991 1/	155.0	199.0	221.3	225.0	333.0	1,150.0	209.7	240.0	1,500.0	4,233.0	450.0	4,683.0

1/ Preliminary.

APRIL 1991

PRODUCTION ESTIMATES AND CROP ASSESSMNET DIVISION, FAS,USDA

WORLD FLAXSEED PRODUCTION

World flaxseed production for 1990/91 is estimated at 2.3 million tons, up 476,000 tons or 26 percent from 1989/90. The majority of this increase was due to the larger area and favorable growing conditions in Canada, where flaxseed production was up 88 percent from last year to 935,000 tons. Four countries account for 85 percent of the total world flaxseed output. They are Canada, Argentina, India, and the Soviet Union. The United States, once a major flaxseed producer, now accounts for only 4 percent of world production. Canada, more than any other country, is responsible for significant swings in global flaxseed supplies from year to year. Producers are fortunate to have alternative crops such as wheat and rapeseed to plant in response to market prices. As shown in the table below, Canada produced 40 percent of the world's flaxseed in 1990/91, followed by Argentina, India, and the Soviet Union.

COMPARATIVE FLAXSEED PRODUCTION
OF MAJOR PRODUCERS 1975/76 AND 1990/91

	1975/76		1990/91	
Country	Production	Percent	Production	Percent
	(1,000)		(1,000)	
Canada	445	18.1	935	40.1
Argentina	377	15.3	480	20.6
India	598	24.3	400	17.2
Soviet Union	340	13.8	165	7.1
United States	395	16.1	97	4.2
EC-12	45	1.8	95	4.1
Others	257	10.6	157	6.7
Total	2,457	100.0	2,329	100.0

Production of flaxseed in Argentina, the second largest producer at 480,000 tons in 1990/91, was down 7 percent from 1989/90. Argentina, like Canada, produces flaxseed for both export and domestic utilization. The 1990/91 crop was down due to a return to average yields from last year's near record. Flaxseed area and production has been trending downward at a very modest rate in Argentina during the 1980's and could be characterized as relatively stable since 1985.

Reports from U.S. agricultural attaches stationed at U.S. embassies in the major flaxseed producing countries indicate that area planted for the 1991/92 crop will not change significantly from 1990/91. The USDA will release the initial flaxseed production forecast for 1991/92 in July, along with other oilseed forecasts.

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TABLE 14

World Flaxseed Harvested Area

	75/76	76/77	77/78	78/79	79/80	80/81	81/82	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91(f)
Countries Sorted by 1,000's of Hectares in 1990/91.																
India	2,119	1,888	2,010	2,092	1,614	1,673	1,820	1,404	1,487	1,395	1,420	1,155	1,151	1,199	1,180	1,200
Soviet Union	1,403	1,361	1,362	1,339	1,212	1,266	1,057	1,126	1,173	1,159	1,100	1,053	1,069	1,039	871	782
Canada	567	324	596	526	931	554	466	631	431	720	740	755	591	501	598	725
Argentina	446	674	884	817	978	726	740	864	770	732	688	745	655	535	575	575
United States	611	386	501	278	355	268	234	297	235	218	236	276	187	91	66	102
EC-12	43	62	72	76	68	62	44	52	51	62	78	64	70	83	96	103
France	26	43	46	54	50	46	30	38	39	47	53	41	47	52	57	55
United Kingdom	--	--	--	--	--	--	--	--	--	--	9	11	8	14	18	26
Belg-Lux	9	9	10	7	7	7	6	9	7	10	11	8	10	11	12	11
Netherlands	5	5	6	5	4	4	3	4	4	4	4	3	4	5	8	10
Italy	3	5	10	10	7	5	5	1	1	1	1	1	1	1	1	1
Romania	83	85	80	75	84	82	83	80	75	50	77	75	75	70	75	75
Bangladesh	14	15	15	15	15	15	15	15	15	15	15	15	75	66	71	70
Poland	79	87	62	84	101	82	59	48	44	43	39	30	28	30	37	40
Czechoslovakia	31	30	33	33	30	31	29	28	30	31	30	30	30	30	30	30
Egypt	20	25	25	25	29	22	16	32	13	12	18	15	15	15	17	17
Pakistan	9	8	10	13	10	11	11	8	9	9	10	10	10	10	10	10
Turkey	13	12	9	5	8	9	8	2	5	8	10	7	8	8	8	8
Hungary	19	19	20	20	15	9	9	9	9	9	6	6	6	6	6	6
Australia	16	15	44	13	17	10	7	5	5	6	10	8	8	3	2	4
Uruguay	103	74	79	61	98	36	10	13	13	10	8	4	1	4	4	4
Iran	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
Mexico	19	12	12	11	8	6	10	1	9	9	3	3	3	3	3	3
World Total	5,598	5,080	5,817	5,486	5,576	4,865	4,621	4,618	4,377	4,491	4,491	4,254	3,985	3,696	3,652	3,757

Source: Production Estimates & Crop Assessment Division, FAS, USDA

Note: (f) denotes preliminary estimates or forecasts.

April 1991

TABLE 15

World Flaxseed Yields

	75/76	76/77	77/78	78/79	79/80	80/81	81/82	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91(f)
Countries Sorted by Metric Tons per Hectare in 1990/91.																
United Kingdom	--	--	--	--	--	--	--	--	--	--	0.78	0.73	1.25	1.86	1.67	1.77
Egypt	1.20	1.20	1.20	1.24	1.17	1.23	1.13	1.19	1.23	1.67	1.22	1.27	1.27	1.27	1.35	1.29
Canada	0.79	0.86	1.10	1.09	0.88	0.80	1.00	1.19	1.03	0.96	1.22	1.36	1.23	0.75	0.83	1.29
Australia	0.75	1.13	0.64	1.00	0.82	0.70	0.86	0.60	0.80	1.00	1.20	1.13	1.00	2.33	1.00	1.25
Hungary	0.95	0.90	0.45	0.60	0.60	1.11	1.22	1.22	1.22	1.00	1.17	1.00	1.17	1.17	1.17	1.17
Italy	0.67	0.80	0.60	0.30	0.43	0.60	0.60	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Iran	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Netherlands	1.00	1.00	1.00	1.00	1.00	1.00	1.33	1.00	0.75	1.00	1.00	1.67	1.25	1.00	1.25	1.00
Mexico	1.42	0.67	1.50	1.36	1.25	1.33	1.20	1.00	1.11	1.11	1.33	1.00	1.00	1.00	1.00	1.00
United States	0.65	0.50	0.73	0.79	0.86	0.73	0.79	0.88	0.75	0.82	0.89	1.06	1.01	0.45	0.47	0.95
Argentina	0.85	0.92	0.92	0.73	0.76	0.84	0.81	0.89	0.86	0.86	0.67	0.84	0.82	0.86	0.90	0.84
Uruguay	0.60	0.62	0.51	0.51	0.66	0.58	0.60	0.69	0.69	0.70	0.75	0.75	1.00	0.75	0.75	0.75
Belg-Lux	0.67	0.89	0.70	1.00	1.00	0.86	0.83	0.78	0.86	0.80	0.73	0.75	0.80	0.73	0.58	0.73
Pakistan	0.44	0.50	0.60	0.54	0.60	0.64	0.64	0.75	0.56	0.56	0.60	0.60	0.60	0.60	0.60	0.60
Bangladesh	0.50	0.47	0.47	0.47	0.47	0.47	0.53	0.53	0.53	0.53	0.53	0.53	0.53	0.55	0.54	0.57
France	1.23	0.84	0.94	0.57	0.84	0.76	0.60	0.82	0.56	0.62	0.64	0.59	0.47	0.60	0.56	0.55
Czechoslovakia	0.36	0.33	0.33	0.30	0.40	0.48	0.41	0.54	0.50	0.48	0.50	0.50	0.50	0.50	0.50	0.50
Turkey	0.62	0.58	0.67	0.60	0.38	0.33	0.25	0.50	0.40	0.38	0.50	0.57	0.50	0.50	0.50	0.50
Romania	0.54	0.59	0.53	0.81	0.56	0.54	0.46	0.54	0.31	0.70	0.47	0.43	0.44	0.43	0.51	0.43
Poland	0.46	0.56	0.61	0.62	0.35	0.35	0.41	0.35	0.43	0.42	0.46	0.50	0.39	0.50	0.46	0.43
India	0.28	0.22	0.26	0.26	0.17	0.25	0.27	0.27	0.30	0.28	0.27	0.27	0.34	0.30	0.29	0.33
Soviet Union	0.24	0.25	0.22	0.19	0.21	0.16	0.16	0.13	0.22	0.21	0.18	0.22	0.21	0.21	0.26	0.21
World Average	0.44	0.42	0.51	0.45	0.48	0.43	0.45	0.54	0.49	0.52	0.52	0.62	0.57	0.45	0.51	0.62

Source: Production Estimates & Crop Assessment Division, FAS, USDA
Note: (f) denotes preliminary estimates or forecasts.

World Flaxseed Production

	75/76	76/77	77/78	78/79	79/80	80/81	81/82	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91(f)
Countries Sorted by 1,000's of Metric Tons in 1990/91.																
Canada	445	277	653	572	815	442	468	752	444	694	902	1,026	729	373	498	935
Argentina	377	617	810	600	743	610	600	765	660	626	460	622	535	460	516	480
India	598	419	527	535	269	423	483	375	444	389	380	317	393	361	342	400
Soviet Union	340	337	300	250	254	196	165	150	259	248	201	233	228	220	227	165
United States	395	193	363	219	305	196	185	261	175	178	211	293	189	41	31	97
EC-12	45	53	62	46	56	48	30	43	32	42	54	44	46	71	80	95
United Kingdom	--	--	--	--	--	--	--	--	--	--	7	8	10	26	30	46
France	32	36	43	31	42	35	18	31	22	29	34	24	22	31	32	30
Netherlands	5	5	6	5	4	4	4	4	3	4	4	5	5	5	10	10
Belg-Lux	6	8	7	7	7	6	5	7	6	8	8	6	8	8	7	8
Italy	2	4	6	3	3	3	3	1	1	1	1	1	1	1	1	1
Bangladesh	7	7	7	7	7	7	8	8	8	8	8	8	40	36	38	40
Romania	45	50	42	61	47	44	38	43	23	35	36	32	33	30	38	32
Egypt	24	30	30	31	34	27	18	38	16	20	22	19	19	19	23	22
Poland	36	49	38	52	35	29	24	17	19	18	18	15	11	15	17	17
Czechoslovakia	11	10	11	10	12	15	12	15	15	15	15	15	15	15	15	15
Hungary	18	17	9	12	9	10	11	11	11	9	7	6	7	7	7	7
Pakistan	4	4	6	7	6	7	7	6	5	5	6	6	6	6	6	6
Australia	12	17	28	13	14	7	6	3	4	6	12	9	8	7	2	5
Turkey	8	7	6	3	3	3	2	1	2	3	5	4	4	4	4	4
Mexico	27	8	18	15	10	8	12	1	10	10	4	3	3	3	3	3
Uruguay	62	46	40	31	65	21	6	9	9	7	6	3	1	3	3	3
Iran	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
World Total	2,457	2,144	2,953	2,467	2,687	2,096	2,078	2,501	2,139	2,316	2,350	2,658	2,270	1,674	1,853	2,329

Source: Production Estimates & Crop Assessment Division, FAS, USDA

Note: (f) denotes preliminary estimates or forecasts.

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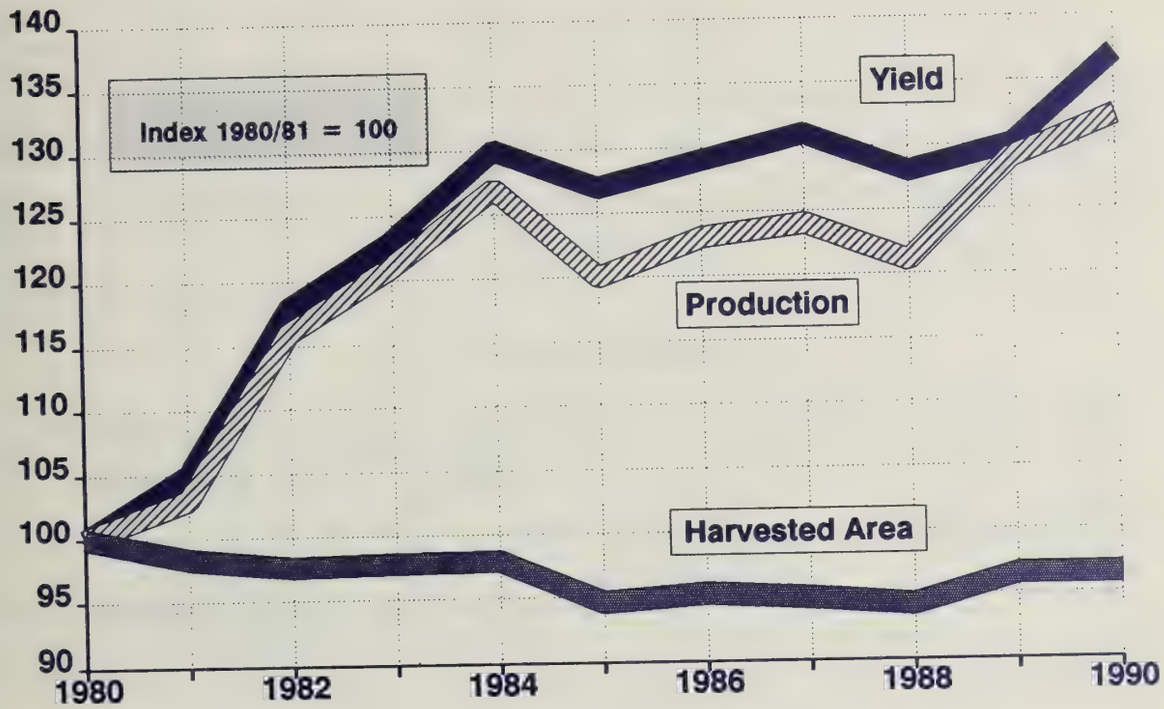

Production Articles This Month...

China Rice
USSR Grain
World Sugar
World Dried Fruit
Canada Grains
World Cotton
World Dairy

Approved by the World Agricultural Outlook Board - USDA

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-254), May 9, 1991.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 382-8888 or by FAX (202) 447-7729.

****
* The next issue of World Agricultural Production will be released at 3 p.m. *
* eastern time on June 12, 1991. *
****

CONVERSION TABLE

Metric Tons to Bushels		Metric Tons to 480-lb. Bales	
		Cotton	= MT*4.592917
Wheat & Soybeans	= MT*36.7437		
Corn, Sorghum, Rye	= MT*39.36825		
Barley	= MT*45.929625		
Oats	= MT*68.894438	Metric Tons to Hundredweight	
1 hectare	= 2.471044 acres	Rice	=MT*22.04622
1 kilogram	= 2.204622 pounds		

NOTE: BEGINNING WITH THE MAY EDITION, THIS CIRCULAR SERIES COMBINES DATA FOR THE TERRITORIES FORMERLY KNOWN AS EAST GERMANY (GDR) AND WEST GERMANY (FRG) UNDER THE HEADING GERMANY. LIKEWISE, DATA FOR THE TERRITORY FORMERLY CALLED EAST GERMANY (GDR) ARE INCLUDED IN AGGREGATES FOR THE EUROPEAN COMMUNITY (EC-12) AND EXCLUDED FROM AGGREGATES FOR EASTERN EUROPE. BECAUSE OF THIS, DATA FOR "GERMANY", EASTERN EUROPE, AND THE EUROPEAN COMMUNITY (EC-12) ARE NOT COMPARABLE WITH DATA PUBLISHED IN PRIOR EDITIONS OF THIS CIRCULAR SERIES AND MAY NOT BE COMPARABLE WITH SUCH ESTIMATES FOUND IN OTHER PUBLICATIONS OF THE U.S. DEPARTMENT OF AGRICULTURE.

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PRODUCTION HIGHLIGHTS FOR 1991/92

May 1991

WHEAT: World production for 1991/92 is projected at 554.5 million metric tons, down 37.9 million, or 6 percent, from the 1990/91 harvest. Foreign production is projected at 498.2 million tons, down 19.8 million or 4 percent from last year. Country highlights are as follows:

- **United States** — Production is projected at 56.4 million tons, down 18.2 million or 24 percent from 1991.

- **USSR** — Production is projected at 92.0 million tons, down 16.0 million or 15 percent from 1990/91. The reduction is due primarily to reduced area and lower anticipated yields.

- **Argentina** — Production is projected at 10.0 million tons, down 1.2 million or 11 percent from 1990/91. Harvested area is forecast to be down roughly 10 percent while yield is forecast to be near average.

- **Australia** — Production is projected at 12.5 million tons, down 3.2 million or 20 percent from 1990/91. Farmers are expected to reduce plantings by 12 percent owing to poor wheat price prospects.

- **Brazil** — Production is projected at 4.8 million tons, up 1.7 million or 53 percent from 1990/91. Area and yields are forecast at average levels. The 1990/91 crop was reduced by frost damage.

- **Canada** — Production is projected at 26.1 million tons, down 5.7 million or 18 percent from 1990/91. After last year's record crop, yield is forecast at a normal level, with harvested area virtually unchanged.

- **China** — Production is projected at 95.0 million tons, down 2.5 million tons or 3 percent from last year's record crop. Winter wheat area is estimated to have increased slightly and good yields are anticipated because of mostly favorable weather. Planting conditions for the spring wheat crop have been favorable.

- **East Europe** — Production is projected at 37.9 million tons, down 3.2 million or 8 percent from the 1990/91 crop. The decrease is due mainly to reductions in estimated area and, in Bulgaria and Romania, to poor weather.

- **EC-12** — Production is projected at 89.0 million tons, up 4.2 million or 5 percent from 1990/91. Fall and winter weather throughout the EC was generally favorable. Spain, France, Greece, Portugal, and the United Kingdom are likely to show significant production increases, while modest production declines are forecast for Italy and the Netherlands.

- **India** — Production is projected at a near record 54.0 million tons, up 4.3 million or 9 percent from 1990/91. Wheat area is estimated to have increased 3 percent while estimated yield was boosted by excellent planting moisture and timely winter rains. Harvesting has progressed under mostly dry conditions.

- **Pakistan** — Production is projected at a record 15.0 million tons, up 0.7 million or 5 percent from 1990/91. Wheat area is forecast to have increased barely 1 percent, but crop yield was boosted by a long cool growing season and plentiful winter rainfall.

- **Turkey** — Production is projected at 15.5 million tons, up 0.5 million or 3 percent from the 1990/91 crop and 1.0 million tons short of the record 1988/89 production. Winter weather was very favorable over the major producing areas with the exception of the southeast.

COARSE GRAINS: World production for 1991/92 is projected at 830.6 million tons, up 6.1 million or less than 1 percent from last year. Foreign production is projected at 590.2 million tons, down 3.7 million or less than 1 percent from 1990/91. Country highlights are as follows:

- **United States** — Production is projected at 240.4 million tons, up 9.8 million or 4 percent from last year.

- **USSR** — Production is projected at 104.5 million tons, down 8.8 million or 8 percent from 1990/91. Increases in corn and barley area will likely be more than offset by lower yields.

- **Brazil** — Production is projected at 26.7 million tons, up 2.6 million or 11 percent from 1990/91. Both winter barley and summer coarse grains are forecast to recover from 1990/91's low levels.

- **East Europe** — Production is estimated at 57.2 million tons, up 4.6 million tons or 9 percent from the 1990/91 crop. The increase in production is due to higher estimated area and yield following last year's drought-reduced crops.

- **Turkey** — Production is estimated at 9.4 million tons, up 0.5 million tons or 6 percent from the 1990/91 crop. Early spring rains have favored yields.

- **China** — Production is projected at 99.4 million tons, down 6.6 million or 6 percent from 1990/91. Farmers are expected to reduce corn area in 1991 because of unusually large stocks and depressed prices following last year's record corn crop. Coarse grain yields are also expected to decline from last year's exceptionally good yields.

- **Canada** — Production is projected at 23.0 million tons, down 3.0 million or 12 percent from 1990/91. Lower harvested area is estimated for barley, oats, and rye, while yields are projected at average levels.

- **EC-12** — Production is projected at 90.8 million tons, up 6.4 million or 8 percent from 1990/91. France, Italy, and Spain are expected to show increases after 1990/91's drought-reduced summer crops. Favorable weather in Spain has significantly increased the winter barley yield potential.

- **South Africa** — Production is projected at 8.6 million tons, up 1.0 million or 13 percent from 1990/91. Corn output, at 8.0 million tons, is seen rebounding from 1990/91's weather reduced harvest. Average yield is assumed for the corn crop that will be planted in November 1991.

- **India** — Production is projected at 33.0 million tons, down 2.0 million or 6 percent from the 1990/91 record harvest. Most of the estimated decrease is attributed to a return to more normal yields, as well as diversion of some millet area to alternative crops.

RICE (MILLED-BASIS): World production for 1991/92 is projected at 345.9 million tons, down 3.1 million or less than 1 percent from the 1990/91 crop. Foreign production in 1991/92 is projected at 341.0 million tons, down 2.8 million or less than 1 percent from from 1990/91. U.S. output is projected at 4.9 million tons, down 0.2 million or 2 percent from last season.

OILSEEDS: World oilseed production for 1991/92 is forecast at 223.0 million tons, up 5.3 million or 2 percent from 1990/91. Foreign production is forecast at a record 162.5 million, up 5.3 million or 3 percent from 1990/91. U.S. oilseed production is projected at 60.5 million, essentially unchanged from 1990/91.

COTTON: World production for 1991/92 is projected at a record 91.0 million bales, 5 percent more than the current season and 2 percent above the previous record 89-million-bale crop harvested in 1984/85. U.S. production is projected at 16.0 million bales, 3 percent above last year and the largest crop since 1953/54 when output hit 16.4 million bales. Total foreign production is projected at 75.0 million bales, a gain of 5 percent over 1990/91 and second only to the 1984/85 record of 76.0 million bales.

PRODUCTION HIGHLIGHTS FOR 1990/91

WHEAT: World production for 1990/91 is estimated at a record 592.5 million tons, up 2.3 million or less than 1 percent from last month. Upward revisions were made for Turkey and China.

COARSE GRAINS: World production for 1990/91 is estimated at 824.5 million tons, down 1.5 million or less than 1 percent from last month. Reduced estimates for Nigeria, Romania, and Bulgaria were partly offset by a higher estimate for China.

RICE (MILLED-BASIS): World production for 1990/91 is estimated at a record 349.0 million tons, down 0.1 million or less than 1 percent from last month. Downward revisions were made for the USSR and Bangladesh but the estimate for Australia was raised slightly.

OILSEEDS: Total world oilseeds production during 1990/91 is forecast at a record 217.7 million tons, down 0.5 million from last month, but up 3.0 million or 1 percent from 1989/90. Foreign production during 1990/91 is estimated to be a record 157.2 million tons, down 0.4 million from last month, but up 1.7 million or 1 percent from last year. U.S. total oilseed production is estimated at 60.5 million, down 0.1 million from last month but up 1.2 million or 2 percent from last year.

* **Soybeans:** World production for 1990/91 is estimated at 104.1 million tons, down 0.7 million from last month or 1 percent, and down 3.1 million or 3 percent from last year. Total foreign soybean output is estimated at 51.8 million tons, down 0.7 million or 1 percent from last month and down 3.0 million or 6 percent from 1989/90. Country highlights are as follows:

  - **United States** — Production is estimated at 52.3 million tons, unchanged from last month and down marginally from last year.

  - **Brazil** — Production is forecast at 16.0 million tons, down 1.0 million or 6 percent from last month and down 21 percent from last year. The decrease in production is due to weather-reduced yield prospects in the soybean growing regions of Rio Grande do Sul.

- **India** — Production is estimated at a record 2.4 million tons, up 0.3 million or 14 percent from last month and up 41 percent from last year's record harvest. Crop cutting surveys show crop yield and harvested area were higher than previously estimated.

- **Mexico** — Production is estimated at 0.6 million tons, up 0.1 million or 21 percent from last month, but down 42 percent from last year. Beneficial summer rains have increased expected average yield.

- **Paraguay** — Production is estimated at 1.3 million tons, down 0.1 million or 7 percent from last month and down 17 percent from last year. The reduction is due to lower estimated area. The 1990/91 crop was also negatively impacted by a lack of precipitation during critical growth stages.

* **Cottonseed:** World production for 1990/91 is forecast at 34.1 million tons, up marginally from last month and up 2.4 million or 7 percent from last year. Total foreign production is estimated at 28.7 million tons, up 0.1 million or less than 1 percent from last month and up 1.2 million or 4 percent above last year. Country highlights are as follows:

  - **United States** — The National Agricultural Statistics Service estimates production at 5.4 million tons, down 0.1 million or 2 percent from last month, but up 28 percent from 1989/90. Higher estimated harvested area was more than offset by reduced average yields.

  - **India** — Production is estimated at 4.1 million tons, down 0.1 million or 3 percent from last month and down 12 percent from last year's record harvest. The cottonseed yield estimate was reduced due to lower lint output from poor harvest conditions.

  - **Soviet Union** — Production is estimated at 5.4 million tons, up 0.1 million or 3 percent from last month, but down 3 percent from last year.

* **Peanuts:** World production for 1990/91 is forecast at 21.6 million tons, down marginally from last month and down 0.3 million or 1 percent from 1989/90. Total foreign production is estimated at 19.9 million tons, down marginally from last month and down 0.1 million or 1 percent from 1989/90. Country highlights are as follows:

  - **United States** — Production is estimated at 1.6 million tons, unchanged from last month, but down 10 percent from 1989/90.

* **Sunfloverseed:** World production for 1990/91 is forecast at 22.0 million tons, up 0.3 million or 1 percent from last month and up marginally from last year. Total foreign production is estimated at 21.0 million tons, up 0.3 million or 1 percent from last month, but down 0.2 million or 1 percent from last year. Country highlights are as follows:

  - **United States** Production is estimated at 1.0 million tons, unchanged from last month, but up 29 percent from 1989/90.

  - **Argentina** Production is estimated at 3.9 million tons, up 0.3 million or 8 percent from last month and up 3 percent from last year. Excellent summer weather is expected to increase average yield to a record 1.7 tons per hectare.

* **Rapeseed:** World production for 1990/91 is forecast at a record 25.4 million tons, down marginally from last month, but up 3.5 million or 16 percent from last year. There were no significant changes this month.

* **Flaxseed:** World production for 1990/91 is forecast at 2.3 million tons, down marginally from last month, but up 0.5 million or 26 percent from last year. While production by the United States is small, this year's output is expected to increase by 213 percent over last year, to 97,000 tons. Total foreign production is pegged at 2.2 million tons, down marginally from last month, but up 0.4 million or 23 percent from last year. There were no significant changes this month.

* **Copra:** World production for 1990/91 is forecast at 4.96 million tons, up 55,000 tons or 1 percent from last month and up 1 percent from last year. Copra production reached a record 5.3 million in 1985/86. There were no significant country changes this month.

* **Palm Kernels:** World production for 1990/91 is forecast at 3.3 million tons, down marginally from last month, but up 1 percent from last year. There were no significant country changes this month.

* **Palm Oil:** World production for 1990/91 is forecast at a record 10.9 million tons, up marginally from last month, but down 21,000 tons from last year. There were no significant country changes this month.

COTTON: World cotton production in 1990/91 is estimated at 86.8 million bales, down 0.2 million bales or less than 1 percent from last month but up 6.6 million bales or 8 percent from last year. Foreign production is estimated at 71.3 million bales, down 0.2 million from last month but up 3.3 million bales or 5 percent from the 1989/90 estimate. Country highlights are as follows:

- **United States** — Production is estimated at 15.5 million bales, up slightly from last month and up 27 percent from last year. Area increased slightly.

- **India** — Production is estimated at 9.4 million bales, down 0.3 million or 3 percent from last month, and down 12 percent from last year's record crop. Yields were forecast lower due to weather problems, including drought in Gujarat and late-season heavy rainfall in north and central India.

- **Australia** — Production is estimated at a record 1.8 million bales, up 0.2 million or 9 percent from last month, and up 25 percent from last year's record harvest. Yields were forecast higher after a nearly ideal harvest period.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD			PRODUCTION		
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. May	1989/90	Prel. 1990/91	1991/92 Proj. May
	--Million Acres--			--Million Acres--			--Bushels per Acre--			--Million Bushels--		
All Wheat	76.6	77.3		62.2	69.4		32.7	39.5		2,037	2,739	2,071
Winter	55.1	57.0	51.0	41.5	50.0	40.5	35.0	40.7	36.9	1,455	2,033	1,496
Other	21.5	20.3		20.7	19.4		28.1	36.4		582	705	575
Rye	2.0	1.6		0.5	0.4		28.2	27.1		14	10	12
Soybeans	60.8	57.8		59.5	56.5		32.3	34.0		1,924	1,922	1,875
Corn	72.2	74.2		64.7	67.0		116.3	118.5		7,525	7,933	8,275
Sorghum	12.6	10.5		11.1	9.1		55.4	62.9		615	571	640
Barley	9.1	8.2		8.3	7.5		48.6	55.9		404	419	425
Oats	12.1	10.4		6.9	5.9		54.3	60.1		374	357	300
							--Pounds per Acre--			--Million CWT--		
Rice	2.7	2.9		2.7	2.8		5,749	5,507		154.5	154.9	154.0
										--Million 480-Pound--		
All Cotton	10.6	12.4		9.5	11.7		614	634		12.2	15.5	16.0

1/Estimates from USDA National Agricultural Statistics Service (NASS) for 1989/90, 1990/91 and winter wheat forecast for 1991/92.
All other 1991/92 projections are from USDA Interagency Commodity Estimates Committees.

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TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			USSR	Asia					South America		Selected Other			All Other Countries
			United States	Canada	Mexico	EC-12	Oth. W. Europe	Eastern Europe		China	India	Indo-nesia	Paki-stan	Thai-land	Argen-tina	Brazil	Aus-tralia	South Africa	Turkey	
	—Million Metric Tons—																			
Wheat																				
1989/90	537.9	482.5	55.4	24.6	4.0	82.0	4.4	40.9	92.3	90.8	54.1	0.0	14.4	0.0	10.2	5.6	14.1	2.0	12.5	15.4
1990/91 prel.	592.5	517.9	74.5	31.8	3.9	84.9	5.0	41.0	108.0	97.5	49.7	0.0	14.3	0.0	11.2	3.1	15.7	1.7	15.0	18.2
1991/92 proj.																				
May	554.5	498.2	56.4	26.1	3.8	89.0	4.1	37.9	92.0	95.0	54.0	0.0	15.0	0.0	10.0	4.8	12.5	2.4	15.5	17.3
Coarse Grains																				
1989/90	800.4	579.0	221.4	23.5	14.1	89.6	12.4	60.7	104.8	93.5	34.6	5.0	2.7	4.3	8.3	22.5	6.9	9.5	7.5	79.1
1990/91 prel.	824.5	593.9	230.6	26.0	16.3	84.4	13.6	52.6	113.3	106.0	35.0	5.3	2.9	4.0	11.1	24.2	6.8	7.6	8.9	76.2
1991/92 proj.																				
May	830.6	590.2	240.4	23.0	16.0	90.8	12.2	57.2	104.5	99.4	33.0	5.6	2.4	4.1	10.2	26.7	7.4	8.6	9.4	79.7
Rice (Milled)																				
1989/90	344.0	338.9	5.1	0.0	0.4	1.4	0.0	0.2	1.7	126.1	74.1	29.1	3.2	13.3	0.2	4.9	0.7	0.0	0.2	23.3
1990/91 prel.	349.0	343.8	5.1	0.0	0.2	1.6	0.0	0.2	1.6	129.5	75.0	29.2	3.1	11.4	0.2	6.7	0.5	0.0	0.2	23.9
1991/92 proj.																				
May	345.9	341.0	4.9																	
Total Grains 1/																				
1989/90	1,682.4	1,400.5	281.9	48.0	18.5	173.0	16.8	101.8	198.8	310.4	162.7	34.1	20.4	17.6	18.7	33.0	21.7	11.5	20.2	193.4
1990/91 prel.	1,765.9	1,455.7	310.2	57.8	20.4	170.9	18.6	93.8	222.9	333.0	159.6	34.5	20.3	15.4	22.5	34.0	23.1	9.3	24.1	195.7
1991/92 proj.																				
May	1,731.0	1,429.4	301.6																	
Oilseeds 2/																				
1988/89	203.9	153.6	50.3	5.9	1.0	11.9	0.6	4.7	13.4	30.6	19.4	2.0	3.2	0.8	10.7	24.6	0.8	0.8	2.3	21.0
1989/90 prel.	214.8	155.5	59.2	4.9	1.4	11.4	0.7	5.5	14.3	28.5	19.5	2.0	3.3	0.9	15.8	21.8	2.4	1.0	2.3	19.8
1990/91 proj.																				
Apr.	218.1	157.5	60.6	5.7	0.9	12.7	0.7	4.8	13.4	33.1	19.9	2.1	3.6	0.7	16.1	18.5	1.0	0.9	2.0	21.5
May	217.7	157.2	60.5	5.7	1.0	12.7	0.7	4.8	13.5	33.1	20.1	2.1	3.6	0.7	16.3	17.5	1.0	0.9	2.0	21.4
	—Million 480-Pound Bales—																			
Cotton																				
1988/89	84.9	69.5	15.4	0.0	1.4	1.6	0.0	0.1	12.7	19.1	8.5	0.0	6.5	0.2	0.9	3.4	1.3	0.4	3.0	10.4
1989/90 prel.	80.2	68.0	12.2	0.0	0.8	1.5	0.0	0.1	12.3	17.4	10.7	0.0	6.7	0.1	1.3	3.0	1.4	0.3	2.8	9.6
1990/91 proj.																				
April	87.0	71.5	15.5	0.0	0.8	1.5	0.0	0.1	12.0	20.5	9.6	0.0	7.5	0.1	1.4	3.2	1.6	0.2	3.0	10.1
May	86.8	71.3	15.5	0.0	0.8	1.5	0.0	0.1	12.0	20.5	9.4	0.0	7.5	0.1	1.4	3.2	1.8	0.2	3.0	10.0

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains and pulses are 210.9 million tons in 1989/90, 235.0 million in 1990/91, and 210.0 million forecast in 1991/92.
2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also include copra and palm kernels for all countries.
Note: Entries of 0.0 indicate no reported or insignificant production.

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TABLE 3

Wheat Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD			PRODUCTION		
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. May	1989/90	Prel. 1990/91	1991/92 Proj. May
	---Million Hectares---			---Metric Tons Per Hectare---			---Million Metric Tons---		
World	225.5	231.4		2.39	2.56		537.9	592.5	554.5
United States	25.2	28.1		2.20	2.66		55.4	74.5	56.4
Total Foreign	200.3	203.4	201.4	2.41	2.55	2.47	482.5	517.9	498.2
Maj. Foreign Exporters	45.0	46.3	44.9	2.91	3.10	3.06	130.9	143.6	137.6
Argentina	5.5	5.9	5.3	1.86	1.90	1.89	10.2	11.2	10.0
Australia	8.9	9.9	8.7	1.58	1.59	1.44	14.1	15.7	12.5
Canada	13.6	14.1	14.0	1.80	2.26	1.86	24.6	31.8	26.1
EC-12	17.0	16.5	16.9	4.83	5.15	5.26	82.0	84.9	89.0
Major Importers	96.4	97.3	95.9	2.48	2.68	2.53	239.0	260.5	242.1
Brazil	3.4	2.7	3.2	1.65	1.16	1.50	5.6	3.1	4.8
China	29.8	30.3	30.5	3.04	3.22	3.11	90.8	97.5	95.0
Eastern Europe	9.9	10.0	9.9	4.14	4.11	3.83	40.9	41.0	37.9
Egypt	0.6	0.7	0.8	5.05	5.79	6.40	3.2	4.3	4.8
Other N. Africa 1/	4.7	5.1	5.3	1.13	1.11	1.28	5.3	5.6	6.8
Japan	0.3	0.3	0.3	3.47	3.66	3.46	1.0	1.0	0.9
USSR	47.7	48.2	46.0	1.94	2.24	2.00	92.3	108.0	92.0
Other Foreign	58.9	59.8	60.6	1.91	1.91	1.95	112.6	113.9	118.4
India	24.1	23.5	24.3	2.24	2.12	2.22	54.1	49.7	54.0
Iran	6.0	6.1	6.2	0.97	1.00	1.03	5.8	6.1	6.4
Mexico	1.0	1.0	1.0	4.21	4.11	4.00	4.0	3.9	3.8
Non-EC W. Europe	0.8	0.9	0.8	5.19	5.40	5.01	4.4	5.0	4.1
Pakistan	7.7	7.8	8.0	1.87	1.82	1.89	14.4	14.3	15.0
South Africa	1.8	1.7	1.9	1.11	1.00	1.26	2.0	1.7	2.4
Turkey	8.7	8.8	8.8	1.44	1.71	1.76	12.5	15.0	15.5
Others	8.7	10.0	9.7	1.76	1.81	1.78	15.4	18.2	17.3

1/ Algeria, Libya, Morocco, and Tunisia.

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TABLE 4

Coarse Grains Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD			PRODUCTION		
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. May	1989/90	Prel. 1990/91	1991/92 Proj. May
TOTAL COARSE GRAINS	---Million Hectares---			---Metric Tons Per Hectare---			---Million Metric Tons---		
World 1/	321.0	318.5		2.49	2.59		800.4	824.5	830.6
United States	37.0	36.4		5.98	6.34		221.4	230.6	240.4
Total Foreign	284.0	282.2	284.1	2.04	2.10	2.08	579.0	593.9	590.2
Maj. Foreign Exporters	21.4	21.1	21.6	2.46	2.62	2.47	52.5	55.4	53.2
Argentina	3.2	3.5	3.6	2.64	3.20	2.82	8.3	11.1	10.2
Australia	4.0	4.3	4.8	1.71	1.61	1.53	6.9	6.8	7.4
Canada	8.3	8.0	7.5	2.84	3.24	3.07	23.5	26.0	23.0
South Africa	4.4	3.8	4.2	2.18	1.97	2.07	9.5	7.6	8.6
Thailand	1.6	1.5	1.5	2.78	2.58	2.72	4.3	4.0	4.1
Major Importers	103.7	99.8	101.8	2.73	2.82	2.77	283.3	281.6	282.3
Eastern Europe	16.4	15.9	16.2	3.70	3.30	3.52	60.7	52.6	57.2
EC-12	20.2	19.2	19.2	4.43	4.39	4.74	89.6	84.4	90.8
Other W. Europe	3.1	3.0	3.0	3.97	4.46	4.10	12.4	13.6	12.2
Mexico	7.5	8.2	8.5	1.88	1.97	1.88	14.1	16.3	16.0
USSR	56.0	52.9	54.5	1.87	2.14	1.92	104.8	113.3	104.5
Other Major Import. 2/	0.4	0.4	0.4	3.83	3.63	3.70	1.6	1.5	1.5
Other Foreign	158.9	161.3	160.7	1.53	1.59	1.58	243.3	256.9	254.7
Brazil	12.5	13.5	13.5	1.79	1.79	1.98	22.5	24.2	26.7
China	28.2	28.7	28.3	3.31	3.69	3.52	93.5	106.0	99.4
India	37.7	38.9	37.8	0.92	0.90	0.87	34.6	35.0	33.0
Indonesia	2.7	2.9	3.1	1.85	1.83	1.84	5.0	5.3	5.6
Nigeria	9.9	9.5	9.9	0.82	0.67	0.84	8.1	6.3	8.3
Philippines	3.6	3.8	3.9	1.24	1.24	1.24	4.5	4.7	4.9
Turkey	4.4	4.5	4.5	1.70	1.99	2.11	7.5	8.9	9.4
Others	59.8	59.5	59.9	1.13	1.12	1.13	67.6	66.5	67.5
BARLEY									
World	74.8	73.2		2.27	2.54		169.8	185.8	177.3
United States	3.4	3.0		2.62	3.00		8.8	9.1	9.3
Total Foreign	71.4	70.2	72.0	2.25	2.52	2.33	161.0	176.7	168.0
Australia	2.4	2.5	2.9	1.73	1.61	1.50	4.1	4.1	4.4
Canada	4.7	4.6	4.3	2.50	2.93	2.73	11.7	13.5	11.8
China	3.3	3.3	3.3	1.74	1.73	1.73	5.7	5.7	5.7
Eastern Europe	3.6	3.6	3.5	4.05	4.07	3.75	14.6	14.8	13.3
EC-12	12.6	12.3	12.0	4.05	4.15	4.32	51.0	50.9	51.8
Other W. Europe	1.5	1.5	1.5	3.87	4.31	3.91	5.9	6.3	5.9
Turkey	3.4	3.4	3.4	1.46	1.76	1.91	4.9	6.0	6.5
USSR	27.6	26.1	28.5	1.75	2.34	1.89	48.5	61.0	54.0
Others	12.4	12.9	12.6	1.18	1.11	1.17	14.6	14.4	14.7

FOOTNOTES AT END OF TABLE

MAY 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD			PRODUCTION		
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. May	1989/90	Prel. 1990/91	1991/92 Proj. May
CORN	---Million Hectares---			---Metric Tons Per Hectare---			---Million Metric Tons---		
World	126.1	126.7		3.66	3.69		461.2	467.8	492.2
United States	26.2	27.1		7.30	7.44		191.2	201.5	210.2
Total Foreign	99.9	99.6	102.9	2.70	2.67	2.74	270.0	266.3	282.0
Maj. Foreign Exporters	6.7	6.5	6.9	2.72	2.82	2.75	18.2	18.2	19.0
Argentina	1.7	2.0	2.2	3.06	3.75	3.27	5.2	7.5	7.2
South Africa	3.6	3.1	3.4	2.47	2.26	2.35	8.9	7.0	8.0
Thailand	1.4	1.4	1.3	2.93	2.74	2.88	4.1	3.7	3.8
Major Importers	21.2	19.7	22.3	3.95	3.39	3.80	83.8	66.7	84.6
Eastern Europe	7.1	6.5	7.0	4.21	3.24	4.00	29.7	21.1	27.8
EC-12	3.9	3.5	4.0	6.91	6.26	7.08	26.9	21.6	28.1
Other W. Europe	0.2	0.2	0.2	7.68	7.91	7.88	1.7	1.8	1.7
Mexico	5.8	6.6	7.0	1.68	1.82	1.71	9.8	12.0	12.0
USSR	4.1	2.8	4.0	3.71	3.50	3.63	15.3	9.8	14.5
Other Maj. Import. 2/	0.1	0.1	0.1	4.28	4.10	4.18	0.5	0.5	0.5
Other Foreign	72.0	73.4	73.7	2.33	2.47	2.42	168.0	181.3	178.4
Brazil	12.1	13.0	13.0	1.80	1.81	2.00	21.8	23.5	26.0
Canada	1.0	1.0	1.1	6.36	7.00	6.00	6.4	7.0	6.6
China	20.4	21.0	20.6	3.88	4.29	4.08	78.9	90.0	84.0
Egypt	0.8	0.8	0.9	5.37	5.43	5.59	4.5	4.6	4.8
India	5.9	5.9	5.9	1.61	1.61	1.53	9.4	9.5	9.0
Indonesia	2.7	2.9	3.1	1.85	1.83	1.84	5.0	5.3	5.6
Philippines	3.6	3.8	3.9	1.24	1.24	1.24	4.5	4.7	4.9
Zimbabwe	1.2	1.1	1.2	1.69	1.52	1.67	1.9	1.6	2.0
Others	24.4	23.9	24.1	1.46	1.47	1.47	35.5	35.2	35.6
SORGHUM									
World	40.6	39.7		1.35	1.34		54.8	53.2	54.6
United States	4.5	3.7		3.48	3.95		15.6	14.5	16.3
Total Foreign	36.1	36.0	35.9	1.08	1.08	1.07	39.1	38.7	38.3
Argentina	0.7	0.8	0.7	2.86	3.33	2.86	2.0	2.5	2.0
Australia	0.4	0.5	0.5	2.27	1.95	2.00	0.9	0.9	1.0
China	1.6	1.6	1.6	2.72	3.35	3.17	4.4	5.2	5.0
India	14.9	15.0	15.0	0.86	0.83	0.80	12.9	12.5	12.0
Mexico	1.3	1.3	1.2	2.88	2.85	2.92	3.8	3.7	3.5
Nigeria	4.4	4.4	4.4	0.80	0.64	0.80	3.5	2.8	3.5
South Africa	0.2	0.2	0.2	1.11	1.08	1.11	0.3	0.2	0.3
Sudan	3.1	3.0	3.0	0.52	0.50	0.50	1.6	1.5	1.5
Thailand	0.2	0.2	0.2	1.44	1.39	1.47	0.2	0.3	0.3
Others	9.2	9.1	9.2	1.04	1.00	1.02	9.5	9.1	9.3

FOOTNOTES AT END OF TABLE

MAY 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD			PRODUCTION		
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. May	1989/90	Prel. 1990/91	1991/92 Proj. May
OATS	---Million Hectares---			---Metric Tons Per Hectare---			---Million Metric Tons---		
World	22.7	21.7		1.84	2.00		41.8	43.4	40.7
United States	2.8	2.4		1.95	2.16		5.4	5.2	4.4
Total Foreign	19.9	19.3	19.2	1.83	1.98	1.89	36.4	38.2	36.3
USSR	10.8	10.7	10.5	1.57	1.68	1.62	16.8	18.0	17.0
Maj. Foreign Exporters	3.7	3.4	3.5	1.97	2.14	1.99	7.3	7.4	7.0
Argentina	0.4	0.4	0.5	1.44	1.43	1.33	0.6	0.6	0.6
Australia	1.1	1.2	1.3	1.44	1.42	1.38	1.6	1.6	1.8
Canada	1.7	1.5	1.4	2.08	2.33	2.22	3.5	3.5	3.0
Sweden	0.4	0.4	0.4	3.54	4.51	3.86	1.5	1.6	1.6
Other Foreign	5.5	5.2	5.2	2.25	2.48	2.36	12.3	12.8	12.3
China	0.6	0.6	0.6	1.20	1.21	1.18	0.7	0.7	0.7
Eastern Europe	1.2	1.1	1.2	2.59	2.78	2.62	3.1	3.2	3.0
Czechoslovakia	0.1	0.1	0.1	3.24	4.55	4.00	0.3	0.4	0.4
Poland	0.8	0.7	0.8	2.72	2.84	2.67	2.2	2.1	2.0
EC-12	1.9	1.6	1.7	2.82	3.26	3.14	5.2	5.3	5.4
France	0.3	0.2	0.2	3.73	3.86	3.81	1.0	0.9	0.8
Germany	0.7	0.6	0.6	3.68	4.49	4.62	2.4	2.7	2.7
Finland	0.4	0.5	0.4	3.24	3.67	3.28	1.4	1.7	1.3
Norway	0.1	0.1	0.1	3.13	4.58	4.00	0.4	0.6	0.5
Others	1.3	1.2	1.2	1.12	1.09	1.11	1.4	1.4	1.4
RYE									
World	16.9	16.8		2.22	2.32		37.6	38.9	31.2
United States	0.2	0.2		1.77	1.70		0.3	0.3	0.3
Total Foreign	16.7	16.6	13.9	2.23	2.33	2.23	37.3	38.7	30.9
USSR	10.7	10.4	8.5	1.87	2.02	1.82	20.1	21.0	15.5
Maj. Foreign Exporter									
Canada	0.5	0.5	0.4	1.74	1.74	1.71	0.9	0.9	0.6
Other Foreign									
Eastern Europe	3.3	3.4	3.4	2.93	2.87	2.82	9.7	9.9	9.5
Hungary	0.1	0.1	0.1	2.06	2.46	2.22	0.2	0.2	0.2
Poland	2.9	3.1	3.0	2.95	2.86	2.83	8.6	8.8	8.5
Czechoslovakia	0.2	0.2	0.2	4.05	4.26	3.82	0.7	0.7	0.7
EC-12	1.6	1.6	1.2	3.33	3.36	3.64	5.3	5.4	4.3
Denmark	0.1	0.1	0.1	4.82	4.95	4.84	0.5	0.5	0.5
Germany	1.0	1.1	0.6	3.86	3.80	4.76	3.9	4.1	3.0
Others	0.6	0.6	0.5	2.29	2.38	2.11	1.3	1.5	1.0

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.
2/ Japan, Republic of Korea, and Taiwan.

MAY 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 5

Rice Area, Yield, and Production
World and Selected Countries and Regions

	AREA			YIELD			PRODUCTION (Rough Basis)			MILLING RATE			PRODUCTION (Milled Basis)		
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. May	1989/90	Prel. 1990/91	1991/92 Proj. May	1989/90	Prel. 1990/91	1991/92 Proj. May	1989/90	Prel. 1990/91	1991/92 Proj. May
	—Million Hectares—			—Metric Tons Per Hectare—			—Million Metric Tons—			—In Percent—			—Million Metric Tons—		
World	146.5	146.7		3.5	3.5		508.1	515.2	510.6	67.7	67.7	67.7	344.0	349.0	345.9
United States	1.1	1.1		6.4	6.2		7.0	7.0	7.0	73.0	73.0	0.7	5.1	5.1	4.9
Total Foreign	145.4	145.6	144.4	3.4	3.5	3.5	501.1	508.2	505.2	67.6	67.7	67.5	338.9	343.8	341.0
Maj. Foreign Exporters	16.8	16.5		2.3	2.2		38.5	35.7		64.0	63.8		24.6	22.8	
Burma	4.7	4.8		2.9	2.9		13.5	13.7		60.0	60.0		8.1	8.2	
Pakistan	2.1	2.0		2.3	2.3		4.8	4.7		66.7	66.7		3.2	3.1	
Thailand	10.0	9.7		2.0	1.8		20.2	17.3		66.0	66.0		13.3	11.4	
Major Importers	13.8	13.7		4.2	4.3		58.3	58.4		66.1	66.0		38.5	38.6	
EC-12	0.3	0.4		6.2	6.4		2.1	2.4		67.0	67.4		1.4	1.6	
Indonesia	10.5	10.3		4.2	4.4		44.7	45.0		65.0	65.0		29.1	29.2	
Nigeria	0.6	0.7		1.4	1.4		0.9	0.9		60.0	60.0		0.5	0.6	
Republic of Korea	1.3	1.2		6.4	6.2		8.1	7.7		72.8	72.6		5.9	5.6	
Other Maj. Import. 1/	1.0	1.1		2.4	2.3		2.5	2.5		65.5	65.5		1.6	1.6	
Other Foreign	114.8	115.4		3.5	3.6		404.3	414.0		68.2	68.2		275.8	282.4	
Australia	0.1	0.1		8.0	8.6		0.9	0.8		71.5	71.5		0.7	0.5	
Bangladesh	10.5	10.5		2.6	2.6		27.0	26.9		66.7	66.7		18.0	17.9	
Brazil	4.3	4.8		1.7	2.0		7.2	9.8		68.0	68.0		4.9	6.7	
China	32.7	32.7		5.5	5.7		180.1	185.0		70.0	70.0		126.1	129.5	
India	42.2	42.2		2.6	2.7		111.1	112.5		66.7	66.7		74.1	75.0	
Japan	2.1	2.1		6.2	6.3		12.9	13.1		72.8	72.8		9.4	9.6	
Philippines	3.4	3.5		2.6	2.7		8.9	9.4		65.0	65.0		5.8	6.1	
USSR	0.7	0.6		3.9	4.0		2.6	2.4		65.0	65.0		1.7	1.6	
Vietnam	5.9	5.9		3.1	3.1		18.4	18.0		65.0	65.0		12.0	11.7	
Others	12.9	13.2		2.7	2.7		35.2	36.2		66.1	66.1		23.3	23.9	

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Apr.	May	1988/89	1989/90	Apr.	May
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SOYBEANS											
World	55.87	58.03	54.54	1.71	1.85	1.92	1.91	95.55	107.18	104.80	104.06
United States	23.22	24.09	22.87	1.82	2.17	2.29	2.29	42.15	52.35	52.30	52.30
Total Foreign	32.65	33.94	31.67	1.64	1.62	1.66	1.63	53.40	54.82	52.49	51.76
Maj. Foreign Exporters	16.17	16.35	14.70	1.84	1.90	1.90	1.84	29.70	31.09	28.00	27.00
Argentina	4.00	4.95	4.80	1.63	2.17	2.29	2.29	6.50	10.75	11.00	11.00
Brazil	12.17	11.40	9.90	1.91	1.78	1.72	1.62	23.20	20.34	17.00	16.00
Other Foreign	16.48	17.59	16.97	1.44	1.35	1.44	1.46	23.70	23.73	24.49	24.76
Canada	0.53	0.54	0.50	2.16	2.26	2.63	2.63	1.15	1.22	1.33	1.33
China	8.12	8.06	7.50	1.43	1.27	1.52	1.52	11.65	10.23	11.40	11.40
Eastern Europe	0.56	0.54	0.55	1.20	1.51	1.31	1.31	0.67	0.82	0.71	0.71
EC-12	0.53	0.61	0.66	3.10	3.19	2.82	2.82	1.66	1.95	1.85	1.85
India	1.73	2.13	2.30	0.89	0.80	0.95	1.04	1.55	1.72	2.10	2.40
Indonesia	1.18	1.15	1.25	1.02	0.96	0.96	0.96	1.20	1.10	1.20	1.20
Paraguay	0.85	0.98	0.89	1.90	1.61	1.43	1.46	1.62	1.58	1.40	1.30
USSR	0.76	0.83	0.84	1.16	1.15	1.10	1.10	0.88	0.96	0.92	0.92
Others	2.21	2.74	2.49	1.51	1.52	1.43	1.46	3.33	4.17	3.58	3.65
COTTONSEED											
World	33.75	32.35	33.92	0.98	0.98	1.00	1.00	33.21	31.71	34.05	34.07
United States	4.84	3.86	4.75	1.14	1.10	1.17	1.14	5.50	4.24	5.52	5.41
Total Foreign	28.92	28.49	29.18	0.96	0.96	0.98	0.98	27.71	27.47	28.53	28.66
China	5.53	5.20	5.53	1.27	1.24	1.37	1.37	7.05	6.44	7.60	7.60
India	7.34	7.33	7.70	0.51	0.63	0.54	0.53	3.71	4.65	4.18	4.07
Pakistan	2.51	2.60	2.69	1.14	1.12	1.16	1.21	2.85	2.91	3.18	3.27
USSR	3.43	3.34	3.15	1.65	1.67	1.67	1.71	5.65	5.57	5.25	5.40
Others	10.10	10.02	10.10	0.84	0.79	0.83	0.82	8.44	7.91	8.33	8.32
PEANUTS											
World	19.81	19.65	19.39	1.17	1.11	1.11	1.11	23.18	21.89	21.58	21.56
United States	0.66	0.67	0.73	2.74	2.72	2.23	2.23	1.81	1.81	1.63	1.63
Total Foreign	19.15	18.98	18.66	1.12	1.06	1.07	1.07	21.37	20.08	19.94	19.93
Argentina	0.15	0.18	0.20	1.62	1.87	2.37	2.37	0.24	0.34	0.48	0.48
China	2.91	2.96	2.96	1.95	1.81	2.03	2.03	5.69	5.37	6.00	6.00
India	8.53	8.71	8.10	1.06	0.93	0.90	0.90	9.00	8.09	7.30	7.30
Senegal	0.90	0.78	0.92	0.76	1.04	0.73	0.73	0.69	0.82	0.67	0.67
South Africa	0.15	0.09	0.09	1.07	1.35	1.05	1.05	0.16	0.12	0.09	0.09
Sudan	0.58	0.55	0.54	0.78	0.73	0.60	0.60	0.45	0.40	0.33	0.33
Others	5.93	5.72	5.86	0.87	0.87	0.87	0.87	5.13	4.96	5.08	5.07

TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Apr.	May	1988/89	1989/90	Apr.	May
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SUNFLOWERSEED											
World	14.96	15.91	15.88	1.36	1.39	1.37	1.39	20.37	22.03	21.77	22.04
United States	0.78	0.72	0.75	1.05	1.10	1.38	1.38	0.81	0.80	1.03	1.03
Total Foreign	14.18	15.18	15.13	1.38	1.40	1.37	1.39	19.56	21.24	20.74	21.01
Argentina	2.20	2.80	2.30	1.45	1.36	1.57	1.70	3.20	3.80	3.60	3.90
China	0.83	0.72	0.70	1.42	1.49	1.71	1.71	1.18	1.06	1.20	1.20
EC-12	2.16	2.11	2.52	1.84	1.65	1.60	1.61	3.99	3.50	4.08	4.05
East Europe	1.31	1.29	1.29	1.62	1.87	1.69	1.68	2.13	2.42	2.18	2.18
USSR	4.28	4.46	4.62	1.45	1.59	1.41	1.41	6.20	7.10	6.50	6.50
Others	3.40	3.80	3.69	0.84	0.88	0.86	0.86	2.87	3.36	3.18	3.18
RAPESEED											
World	17.88	17.20	18.47	1.27	1.27	1.38	1.37	22.70	21.85	25.40	25.36
Total Foreign	17.88	17.20	18.47	1.27	1.27	1.38	1.37	22.70	21.85	25.40	25.36
Canada	3.67	2.90	2.63	1.17	1.07	1.26	1.26	4.31	3.10	3.33	3.33
China	4.94	4.99	5.49	1.02	1.09	1.26	1.26	5.04	5.44	6.93	6.93
EC-12	1.99	1.81	2.12	2.82	2.96	2.91	2.91	5.59	5.35	6.16	6.16
East Europe	0.73	0.85	0.79	2.43	2.58	2.30	2.28	1.77	2.19	1.82	1.81
India	4.83	4.99	5.60	0.91	0.83	0.95	0.95	4.38	4.12	5.30	5.30
Others	1.72	1.66	1.84	0.93	1.00	1.01	1.00	1.60	1.65	1.87	1.84
FLAXSEED											
World	3.70	3.65	3.74	0.45	0.51	0.62	0.62	1.67	1.85	2.33	2.32
United States	0.09	0.07	0.10	0.45	0.47	0.95	0.95	0.04	0.03	0.10	0.10
Total Foreign	3.61	3.58	3.64	0.45	0.51	0.61	0.61	1.63	1.82	2.23	2.22
Argentina	0.54	0.58	0.58	0.86	0.90	0.83	0.83	0.46	0.52	0.48	0.48
Canada	0.50	0.60	0.73	0.74	0.83	1.29	1.29	0.37	0.50	0.94	0.94
India	1.20	1.18	1.20	0.30	0.29	0.33	0.33	0.36	0.34	0.40	0.40
USSR	1.04	0.87	0.78	0.21	0.26	0.21	0.21	0.22	0.23	0.17	0.17
Others	0.33	0.36	0.36	0.66	0.66	0.68	0.68	0.22	0.23	0.25	0.24
MAJOR OILSEEDS	*145.96*	*146.79*	*145.94*	*1.35*	*1.41*	*1.44*	*1.43*	*196.68*	*206.51*	*209.93*	*209.41*
United States	29.58	29.41	29.20	1.70	2.01	2.08	2.07	50.31	59.24	60.59	60.48
Total Foreign	116.38	117.38	116.74	1.26	1.25	1.28	1.28	146.37	147.28	149.34	148.93
COPRA	--	--	--	--	--	--	--	4.28	4.91	4.91	4.96
PALM KERNEL	--	--	--	--	--	--	--	2.94	3.34	3.30	3.29
TOTAL OILSEEDS	--	--	--	--	--	--	--	*203.90*	*214.76*	*218.13*	*217.67*
PALM OIL 1/	--	--	--	--	--	--	--	9.57	10.92	10.89	10.90

1/ Not included in total oilseeds.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 7

Cotton Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	Apr.	May.	1988/89	1989/90	Apr.	May.
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	33.7	31.5	33.5	549	554	563	564	84.9	80.2	87.0	86.8
United States	4.8	3.9	4.7	694	688	711	711	15.4	12.2	15.5	15.5
Total Foreign	28.9	27.7	28.7	524	535	539	540	69.5	68.0	71.5	71.3
Maj. Foreign Exporters	13.5	13.1	13.2	749	728	781	786	46.5	43.7	47.5	47.7
Australia	0.2	0.2	0.3	1,475	1,406	1290	1,411	1.3	1.4	1.6	1.8
Central America 1/	0.1	0.1	0.1	830	834	807	807	0.4	0.3	0.3	0.3
China	5.5	5.2	5.5	751	728	807	807	19.1	17.4	20.5	20.5
Egypt	0.4	0.4	0.4	718	683	719	719	1.4	1.3	1.4	1.4
Mexico	0.3	0.2	0.2	1,209	891	913	913	1.4	0.8	0.8	0.8
Pakistan	2.5	2.6	2.7	568	560	596	606	6.5	6.7	7.5	7.5
Sudan	0.3	0.3	0.2	443	456	499	499	0.6	0.6	0.4	0.4
Turkey	0.7	0.7	0.7	882	851	976	976	3.0	2.8	3.0	3.0
USSR	3.4	3.3	3.2	805	805	827	827	12.7	12.3	12.0	12.0
Major Importers 2/	0.4	0.4	0.4	837	889	853	853	1.7	1.5	1.5	1.5
Other Foreign	14.9	14.2	15.1	312	348	321	318	21.4	22.8	22.5	22.1
Argentina	0.5	0.6	0.6	389	486	459	459	0.9	1.3	1.4	1.4
Brazil	2.4	1.9	2.1	311	347	332	332	3.4	3.0	3.2	3.2
India	7.3	7.3	7.7	253	317	271	264	8.5	10.7	9.6	9.4
Syria	0.2	0.2	0.2	667	930	977	977	0.5	0.7	0.7	0.7
Others	4.6	4.3	4.6	385	363	356	359	8.0	7.1	7.6	7.5

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

MAY 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 8

The table below presents a 10-year record of the difference between the May projections and the final estimates. Using world wheat production as an example, changes between the May projection and the final estimate have averaged 14.9 million tons (2.9 percent) and ranged from -22.0 to 20.6 million tons. The May projection has been below the final 6 times and above the final 4 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 - 1990/91 1/					
	Difference		Lowest	Highest	Below	Above
	Average	Average	Difference		Final	Final
	Percent	---Million Metric Tons---			Number of Years 2/	
WHEAT						
World	2.9	14.9	-22.0	20.6	6	4
U.S.	4.4	2.6	-4.3	9.8	5	5
Foreign	3.0	13.3	-20.9	20.0	6	4
COARSE GRAINS 3/						
World	3.3	25.3	-31.9	75.3	5	5
U.S.	13.0	23.5	-30.2	70.3	5	5
Foreign	2.1	11.5	-13.2	28.1	3	7
RICE (Milled)						
World	3.2	9.9	-21.8	11.4	7	3
U.S.	6.9	0.3	-1.0	0.5	5	5
Foreign	3.2	10.0	-22.0	11.2	7	3
SOYBEANS						
World	N/A	N/A	N/A	N/A	N/A	N/A
U.S.	8.3	4.0	-4.7	12.0	4	6
Foreign	N/A	N/A	N/A	N/A	N/A	N/A
		---Million 480-lb. Bales---				
COTTON						
World	4.1	3.3	-13.7	5.9	7	3
U.S.	10.7	1.4	-2.8	1.3	5	5
Foreign	3.5	2.4	-12.2	4.6	6	4
UNITED STATES		-------Million Bushels-------				
CORN	13.7	786	-990	2,379	4	6
SORGHUM	16.6	122	-228	171	6	4
BARLEY	13.2	52	-73	206	5	5
OATS	21.2	68	-77	231	3	7

1/ The final estimate for 1981/82-1989/90 is defined as the first November estimate following the marketing year and for 1990/91 last month's estimate.
2/ May not total ten if projection was the same as the final.
3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

May 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

MAY 9, 1991

NOAA/USDA JOINT AGRICULTURAL WEATHER FACILITY

CANADA

Soaking rains in late April improve topsoil moisture over much of Saskatchewan, Manitoba, and parts of Alberta. Planting is usually underway by mid-May as seasonal warming takes place.

UNITED STATES

Heavy rain, flooding and soggy soils cause early season planting delays across much of the cornbelt and Delta States. Timely rain/snow provides excellent germination for spring crops in the northern Great Plains. Warmer, drier weather and rapid planting progress occur in the Southwestern States.

SOUTH AMERICA

In Argentina, good harvest progress was interrupted by recent heavy rains. Rains increased topsoil moisture in winter wheat areas. The persistent heavy rains have subsided in southern Brazil, enabling harvest of summer crops to continue.

EUROPE

Unseasonably cold weather in late April brings subfreezing temperatures as far south as central Spain and southern Yugoslavia. Frost may have damaged citrus, vineyards and tender seedlings. Periodic rain maintains generally adequate moisture for spring growth.

WESTERN USSR

Winter grains break dormancy in good to excellent condition. Recent rain benefits winter grains but slows spring crop planting.

NORTHWESTERN AFRICA

Periodic showers in April benefit winter grains in the reproductive to filling stages. Harvesting usually begins in May.

SOUTH AFRICA

In early April, freezing temperatures caused local damage to immature corn in the west.

NEWLANDS

Unseasonably warm, dry weather in April helps to condition soils for upcoming spring grain planting.

EASTERN ASIA

Abundant rains in Manchuria have boosted topsoil moisture for spring wheat planting. The winter wheat areas have received adequate rainfall as the crop nears heading. April rainfall has been below normal along the southern rice areas, but recent rains have improved the situation.

SOUTHEAST ASIA

Scattered showers have brought local relief to Thailand's rainfed grain areas but continuing hot weather maintains generally unfavorable early planting prospects. Increased rainfall in the Philippines improves local grain planting conditions in southern areas.

AUSTRALIA

Dry weather in New South Wales and Queensland has been beneficial to summer crop harvesting, but rains are needed to improve topsoil moisture for winter wheat planting. The southern and western wheat areas have received adequate rainfall.

(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 447-7917.

WEATHER BRIEFS

EUROPE: SUBFREEZING TEMPERATURES THREATEN CROPS

Unseasonably cold weather returned to portions of northern and western Europe during the period of April 16 through May 4, 1991. Temperatures ranged from 3 to 6 degrees below normal, with subfreezing daily minimum temperatures causing concern for agricultural interests as far south as central Spain and northern Italy. Weather had been generally mild during winter and early spring. Vegetation was probably more tender or developed further than normal and in general more vulnerable to a freeze. Damage has likely occurred to vineyards in France, Spain, and Italy. Also, deciduous fruit, olive, and nut production was hurt in Spain, Italy, France, Germany, the Benelux countries, Poland and Czechoslovakia. Field crops, such as winter grains and newly emerging sugar beets were set back, but not permanently damaged.

WESTERN USSR: RAINS FAVOR GOOD WINTER GRAIN CROP

Precipitation increased across most of the western Soviet Union during the period of April 11 through May 9, 1991 favoring winter grain growth and development. Dryness is becoming a concern across the south central Ukraine, but at least 10 millimeters (mm) of precipitation fell across this region during the week of April 28 through May 4, 1991. This light precipitation somewhat stabilized crop conditions. Widespread heavy rains (25-50mm) fell across the Volga Valley, the Black Soils Region, and the North Caucasus during the week of April 21-27, 1991 and continued in the Black Soils Region, North Caucasus, and Northern Ukraine the week of April 28 through May 4, 1991. During the later week the Volga Valley was dry, easing flooding and favoring field work. The western Ukraine has received around 10 mm of rain each week during April 11 through May 9, 1991 and soil moisture levels should be adequate to sustain favorable winter grain conditions.

CANADA: TIMELY RAINS IMPROVE PRE-PLANTING CONDITIONS

Precipitation during April 11 through May 9, 1991 improved pre-planting soil moisture in the Prairie Provinces of Canada. Most of this precipitation fell after April 22, 1991 and fell as snow. Amounts of 50 to 70 mm (water equivalent) fell in southern Saskatchewan and 25 to 50 mm fell across western Manitoba. Alberta was the driest province, with generally 10 to 25 mm falling on the crop lands south of Edmonton. The recent precipitation will improve prospects for good germination of spring wheat. However, additional timely precipitation will be needed to achieve normal yield levels, as sub-surface moisture levels are mostly depleted.

PRODUCTION BRIEFS

TURKEY: TOBACCO CROP FORECAST LOWER

Based on mid-April transplantings, Turkey's 1991 tobacco production is expected to reach 242,000 tons (farm sales weight) compared to 212,144 tons estimated in January. Almost all production is oriental tobacco which is in surplus. Production of burley and flue cured tobacco for domestic cigarettes remains at less than 3,000 tons and is largely still in the experimental stage. Estimated production for 1990 is revised upward to 282,166 tons from 252,144 tons estimated in January. Harvested area was larger than the earlier estimate.

SPAIN: CITRUS PRODUCTION EXCEEDS EXPECTATIONS

Spain's 1990/91 citrus production is forecast at 4.71 million tons, up 2 percent from the December estimate, and 12 percent above last year. Favorable weather, adequate irrigation water, and new tangerine groves coming into production contributed to the increase. Orange production, at 2.57 million tons, is 4 percent above the December forecast. Tangerines are estimated at 1.51 million tons, up almost 2 percent from the December estimate. Lemon production is forecast at 610,000 tons, 2 percent below the December estimate. The decline in production was due to excessive rain. A heavy bloom is reported for the 1991/92 citrus crop.

ZIMBABWE: RECORD TOBACCO CROP HARVESTED

Zimbabwe's 1991 tobacco crop is now harvested and is expected to reach a record 170,250 tons (farm sales weight). This is up 5 percent from the January forecast and 22 percent above the 1990 harvest of 139,803 tons. The rise in estimated 1991 production since January is due to both higher yield and larger-than-expected plantings because of the favorable prices paid for the 1990 crop. The average 1990 price paid was Z$6.47 per kilogram, up from Z$4.30 in 1989. The flue-cured tobacco crop, the major type grown, is also a record estimated at 163,000 tons for 1991, up from 133,866 tons in 1990.

ARGENTINA: LARGE 1991 TOBACCO CROP REPORTED

Argentine 1991 tobacco production is estimated at 93,440 tons (farm sales weight), up 9 percent from the January forecast and 38 percent above the 1990 harvest. Very favorable weather and a 16 percent increase in planting are responsible for the large crop. Plantings rose because farm cooperatives and exporters increased technical services and financial assistance to growers. This was fortunate for growers because prices for the 1991 crop are up 50 percent.

BRAZIL: TOBACCO HARVEST BELOW FORECAST

Brazil's 1991 tobacco crop, now harvested, is estimated at 431,000 tons (farm sales weight). This is down 9,000 tons from the January estimate and 4,000 tons below the 1990 harvest. The drop in production, all in the south, was due to a combination of heavy rain early in the growing cycle which encouraged shallow tobacco root growth and drought later in the season. This led to greater than expected yield reductions in the southern states where production fell despite a 5 percent increase in area.

USSR: GRAIN PROSPECTS DOWN FROM LAST YEAR

The Soviet Union's 1991/92 grain crop outlook is significantly reduced from last year, with expectations of lower yields and a slight reduction in area. The first USDA forecast of the 1991/92 Soviet grain crop is 210 million tons bunker weight basis (see related feature article in this issue). The forecast is 25 million tons below estimated 1990 output. This includes 92.0 million tons of wheat, 104.5 million tons of coarse grains, and 13.5 million tons of other grains and pulses. Grain area for harvest is forecast at 109.0 million hectares, down slightly from last year's 109.5 million. The average yield for total grain is forecast at 1.927 tons per hectare, down from last year's estimated 2.146 tons because of: 1) reduced area of higher-yielding winter grains; 2) the improbability of a repeat of last year's abnormally favorable weather; and 3) continuing reports concerning inadequate supplies of seed, fertilizer, plant protectants, spare parts, and fuel.

Sowing of spring grains got started slightly ahead of normal but is still nearly two weeks behind 1990. A Moscow Radio report on April 18, 1991 indicated that 10 million hectares had been sown to spring crops, about one-half the area sown on the same date last year. Generally dry conditions during April allowed the early start of spring sowing. Winter grains broke dormancy 5-10 days ahead of average after experiencing the third consecutive milder-than-normal winter. Soil moisture supplies are adequate to plentiful nearly everywhere, with only isolated areas having dry topsoil. The current outlook is for good plant establishment for spring-sown crops and early development of fall-sown crops.

BANGLADESH: CYCLONE DAMAGES RICE HARVEST

One of the worst tropical cyclones in 20 years struck the southeastern coast of Bangladesh on April 30, 1991. It originated from the Bay of Bengal and brought large scale damage to low-lying coastal areas and offshore islands. The storm came ashore between Chittagong and Cox's Bazaar, with reported winds of 145 to 150 miles per hour and a 20 foot tidal wave. It unleashed 4 to 8 inches of rain in the core area of the cyclone's path. The nation's third seasonal rice crop, called "boro rice", accounting for approximately 30 percent of annual production, was at harvest stage when the storm arrived. A preliminary damage assessment has been conducted by U.S. Agency For International Development disaster evaluation teams. The field assessment showed that approximately 20 percent of the boro rice crop in Chittagong district was destroyed, while 25 to 30 percent of the boro crop in Cox's Bazaar was lost. The coastal area directly affected by the cyclone normally accounts for nearly 10 percent of the national boro rice harvest. Preliminary estimates indicate that around 200,000 metric tons of rice (rough basis) from the boro crop were destroyed in the field. This translates into roughly 1 percent of 1990/91 rice production.

Currently, soils experts in Bangladesh are assessing the impact of sea water intrusion into coastal paddy fields, with early reports stating that rice cultivation will not be possible for nearly 6 months in many areas affected by the tidal wave. This will impact planting intentions for the first crop of the 1991/92 growing season. First crop, or "aus" rice, is direct seeded to fields from March to May and harvested from June to September. Second crop, or "aman" rice, is sown from March to July and harvested from November to December. Boro rice is planted in November and December and harvested from April to June. The aus crop accounts for nearly 15 percent of annual production and the aman crop for about 55 percent.

ISRAEL: CITRUS PRODUCTION ESTIMATE REDUCED

Israeli 1990/91 citrus production is forecast at 1.09 million tons, down 26 percent form last year and 12 percent below the April estimate. Drought and disruptions in picking because of the war in the Persian Gulf caused more losses than expected. Compared to the April estimate, orange production is down from 700,000 to 600,000 tons; grapefruit is reduced from 380,000 to 365,000 tons; tangerines have declined from 100,000 to 70,000 tons, and lemons are down from 44,000 to 35,000 tons. Dry weather has also reduced the 1991/1992 crop potential. Because of low water supplies, growers' 1991 irrigation quotas are expected to be cut as much as 60 percent in some areas.

GAZA STRIP: CITRUS PRODUCTION BELOW EXPECTATIONS

The Gaza Strip citrus crop losses from drought and labor problems resulting from the war in the Persian Gulf were greater than estimated earlier. Total 1990/91 citrus production is estimated at 120,000 tons, down from 148,000 tons estimated in December and sharply below the 185,000 tons harvested in 1989/90. Oranges are reduced by 20,000 tons to 104,000, grapefruit are down 3,000 tons to 9,000, and lemons are 5,000 lower at 7,000. The 1991/92 crop is likely also to be hurt.

BRAZIL: COFFEE PRODUCTION FORECAST REVISED UPWARD

Brazil's 1991/92 coffee crop is forecast at 28 million 60-kilogram bags, up 3 million from the February forecast of 25 million bags. The new forecast is based on a field survey conducted by the U. S. agricultural counselor in Brasilia. The April 16 to May 3 survey encompassed Brazil's coffee producing areas in the states of Parana, Sao Paulo and Minas Gerais. Parana's coffee cherries did not develop to full normal size due to improper plantation management. In the state of Sao Paulo, a few areas revealed the same condition of smaller than normal size coffee cherries. Coffee trees in Minas Gerais have had a second flowering after mid January that was followed by satisfactory cherry setting and development. In this state, trees have received above average management.

CHILE: MEDFLY INFESTATION REPORTED UNDER CONTROL

According to the U.S. agricultural attache in Santiago, the recent discovery of medfly adults and larvae in Copiapo, a significant table grape and deciduous fruit production area in Northern Chile, did not adversely affect the 1990/91 crops. Harvesting operations ended approximately six weeks ago, and fruit trees and vines are now dormant. All medfly adults and larvae were discovered within 800 meters of one another. To prevent the infestation from spreading, Chilean phytosanitary officials immediately began aerial and ground bait and spray applications, emergency trapping, fruit sampling and stripping, and soil treatments.

SPAIN: LARGER ALMOND CROP PROJECTED

Preliminary assessments by the U.S. agricultural counselor in Madrid indicate that the 1991/92 almond crop will total 60,000-65,000 tons (shelled basis), up from 55,000 tons last season. Although actual production potential in Spain is approximately 90,000-100,000 tons, prospects for the 1991/92 crop were dampened by pollination problems due to heavy rains in Alicante, Murcia and the Balearic Islands, and a cold wave in mid-April in Catalonia and Aragon (see related brief).

CHILE: AVOCADO PRODUCTION EXPANDING

The avocado industry in Chile has experienced fairly steady growth over the past two decades. By the end of 1990, there were 8,315 hectares planted to avocado orchards in Regions I-VII (Northern to central Chile), 74 percent of which were located in Region IV (Valparaiso) and the Metropolitan Region (Santiago). Only 16 percent of the area planted in these two regions has reached full maturity. In Chile, mature production yields occur from the fifteenth through the thirty-fifth year of growth. Chile produces over 35 varieties of avocados, the most important of which are Hass, Fuerte, Bacon, and Edranol. Production for 1991 is forecast at 45,000 tons, up 13 percent from a year ago. The expansion in area and production since 1973 is shown in the following table:

CHILE: AREA AND PRODUCTION OF AVOCADOS

	Planted Area (Hectares)	Production (Metric Tons)
1973	4,490	14,500
1980	6,180	25,000
1985	7,605	29,800
1986	7,705	35,000
1987	7,940	32,000
1988	8,185	28,000
1989	8,195	39,000
1990	8,315	40,000
1991 1/	8,450	45,000
1992 2/	8,800	50,000

1/ Preliminary. 2/ Forecast.

MEXICO: APPLE CROP DAMAGED BY FREEZE

According to the U.S. agricultural counselor in Mexico City, a freeze during late April may have damaged one-half of the 20,000 hectares planted to apples in the State of Chihuahua. However, the freeze reportedly damaged only the early blooming varieties, leaving open the possibility of good crops for other varieties. Chihuahua is the leading apple producing state in Mexico and usually accounts for approximately 57 percent of the total apple crop in a normal year. The areas affected in Chihuahua primarily consist of early red delicious varieties.

YUGOSLAVIA: FREEZE DAMAGE MINIMAL

The U.S. agricultural attache in Belgrade reports that unseasonably cold temperatures the week of April 16-23 probably harmed some tree fruit and vineyards at the higher elevations in Yugoslavia, Bulgaria and Romania. Specific crop damage assessments will be reported as information becomes available.

UNITED KINGDOM: FREEZE CAUSES ISOLATED DAMAGE TO HORTICULTURAL CROPS

Horticultural crops in the United Kingdom sustained isolated damage as a result of below-normal-temperatures during the week of April 14, 1991. Some plums and Brameley apples in the Midlands and southern growing areas were lost, but, overall, prospects remain favorable for a good 1991/92 deciduous fruit crop in the United Kingdom.

SPAIN: FROST DAMAGES CROPS

Temperatures fell well below freezing on the nights of April 18-20, 1991 in northeastern Spain. Crops were damaged, especially in Catalonia and eastern Aragon. Hardest hit were deciduous fruit and almonds. Very preliminary and unofficial estimates place the losses of crop potential as follows: Pears, 35 percent; apples, 28 percent; peaches, 15 percent; almonds, 10-15 percent; and cherries, 9 percent. Damage to wine vineyards and winter grain crops was reported locally but is not believed significant on a national scale. The above estimates do not encompass possible damage from freezing temperatures, which were less widespread, during the first week in May. Official damage estimates will be reported as they become available.

BELGIUM: FROST HURTS FRUITS; SPARES FIELD CROPS

Frosts occurred in Belgium the nights of April 19-20, 1991. Local experts claim the extent of damage to apples and pears will only become clear in late June or early July. It should be noted that some frost damage is normal in Belgium. Growers claim that a frost this late (last year, for example, an early April frost reduced crop potential by 20 percent) may reduce production potential by as much as 50 percent. While some sugar and fodder beet seedlings were lost causing 1-2 percent to need replanting, most field crops were not permanently damaged. The Belgian Ministry of Agriculture expects to make an estimate of losses in late June.

FEATURE COMMODITY ARTICLES

CHINA RICE SITUATION AND OUTLOOK

China produced an estimated 185 million tons of rice (rough basis) in 1990, equal to more than 35 percent of the total world output and almost 65 percent above the production of the second largest producer, India. Favorable weather and an expansion in planted area resulted in consecutive record crops in 1989 and 1990. However, low state procurement and free market prices are expected to cause some rice farmers to switch to more profitable crops. Despite last year's record rice harvest and unusually large current stocks, Government policy continues to emphasize rice production.

CURRENT SITUATION

Weather conditions for the 1991 early rice crop have been mixed. Although most of southern China had mild temperatures and near-normal rainfall in March during the early rice planting season, the weather was drier than normal along the southern coastal provinces of Guangdong and Guangxi. Scattered showers in late March and early April brought beneficial moisture to this area, but the rain was not enough to end the drought. Persistent heavy rainfall and below-normal temperatures in central China have delayed the start of the planting season for single crop rice.

PRODUCTION, AREA, AND YIELD

Rice is the staple food grain for China's 1.14 billion people and makes up about 43 percent of the nation's total grain output. Production in 1990 is estimated at 185 million tons (rough basis), nearly 5 million tons higher than 1989's record crop. While the 1990 provincial production statistics have not yet been released, the Chinese Government announced that early, late, and single rice crops all reached record levels. Early rice production hit a record 50.5 million tons (rough basis) despite reports of serious flooding in Hunan, Anhui, and Jiangxi during the growing season. The single rice crop, which is concentrated in Sichuan and the Yangtze River valley, experienced only minor weather-related losses in 1990. Although the late rice crop was threatened by a series of late-summer typhoons along China's southeast coast, as well as drought in Hunan and Guangxi provinces, the fall harvest weather was favorable and rice yields were excellent. Record rice crops in Heilongjiang, Hebei, and Inner Mongolia pushed rice production in northern China to a historic high.

The record harvest of rice and other grains in 1990 has created a major storage problem for farmers and provincial governments across the country. Existing warehouses are full and about 10 million tons of grain are being stored in the open air. According to local officials, the problem is not too much grain but a lack of storage. In response, the Government has indicated plans to invest heavily in building new grain storage facilities and has set the goal of constructing space for an additional 25 million tons of grain by 1995.

Rice area in 1990 reached an estimated 32.7 million hectares, up slightly from 1988 and 1989. Most of the increase was in the Northeast, where rice consumption is growing rapidly and free market prices are higher than for other grains, but rice area in southern China also managed a slight increase in 1990. This upward trend is unlikely to continue. China's rice area has declined by more than a million hectares since 1980 as many farmers near the urban markets converted rice paddies to vegetable gardens, fruit orchards and fish ponds, all of which produce more income than rice production. Some traditional rice land has been lost each year to factory and housing construction, especially in the vicinity of major cities. In recent years, the Government has tried to slow the transfer of rice land to other uses by raising the State procurement price for grain and instituting tighter restrictions on non-agricultural construction in rural areas. Although these actions have been effective in the short term, the area planted to rice is expected to continue to drop as long as farmers have the option to use their land for more profitable activities.

Despite the drop in area over the last decade, rice production increased because of an expansion in the area planted to high-yield hybrid varieties and an improvement in the supply of agricultural inputs. According to the Ministry of Agriculture, hybrid rice area reached a record 15.9 million hectares in 1990 and now accounts for 49 percent of total rice area and over 60 percent of total output. Officials claimed that hybrids exceeded the output of traditional varieties by an average of 900 KG/HA in 1990. Hybrid area is expected to increase to 17 million hectares by 1992 and 19 million hectares by 1995. Most hybrids are concentrated near major cities where there is easy access to chemical fertilizer and other agricultural inputs, which are in short supply in many parts of the country. In 1990 the Government spent $200 million to improve the production and distribution of chemical fertilizer, diesel fuel, and plastic sheeting and took over the sale and distribution of agricultural inputs to guarantee each farmer a fair share. It also spent $1 billion on agricultural investment in 1990, mainly for irrigation repairs and the construction of more storage facilities.

PRICES

The rice policies of the Chinese Government are designed to protect farmer income and provide more than 200 million urban residents with a secure supply of cheap grain. Chinese rice farmers are required to sign a contract with the Government to sell a percentage of their crop at a fixed State price, currently .52 Yuan/kg or $.10/kg at the official exchange rate (5.2 Yuan = $1.00), in return for the chance to buy agricultural inputs from the Government at subsidized prices. In 1990 the Government bought close to 20 million tons of rice at the State price. Once this obligation is fulfilled, farmers are free to sell their surplus rice to middlemen or on the free market, where prices are currently 3 to 4 times higher than the State price. Many Chinese officials have said that the low State procurement price is one of the main reasons why farmers have switched out of rice production in recent years. In 1989 the Government raised the procurement price by about 20 percent, but budget constraints prevented any increases in 1990. Back-to-back record crops in 1989 and 1990 pushed the free market price to its lowest level in several years, so the Government implemented a "protection" or floor price (approximately .92 Yuan/kg) in a few locations and promised to buy all the rice the farmers wanted to sell. This policy was not carried out in many localities because of a shortage of funds.

Urban residents can purchase their rice in two ways. They receive ration coupons that allow them to buy rice from State grain stores at a highly subsidized price, or they may buy better quality rice on the free market for higher prices. At the end of 1990, ration prices varied from .30 Yuan/kg to .64 Yuan/kg (5.8 to 12.3 cents/kg), generally lower than the State procurement price, while free market prices ranged from .60 Yuan/kg to 2.00 Yuan/kg. As of May 1, 1991, the ration price of rice and other grains was increased by an average of .20 Yuan/kg, or $.04/kg, the first increase in many years. The Government hopes that by narrowing the difference between the purchasing and selling prices of rationed grain it can reduce the burden of grain subsidies on the national budget and continue "further deepening the economic restructuring and rationalizing the price system".

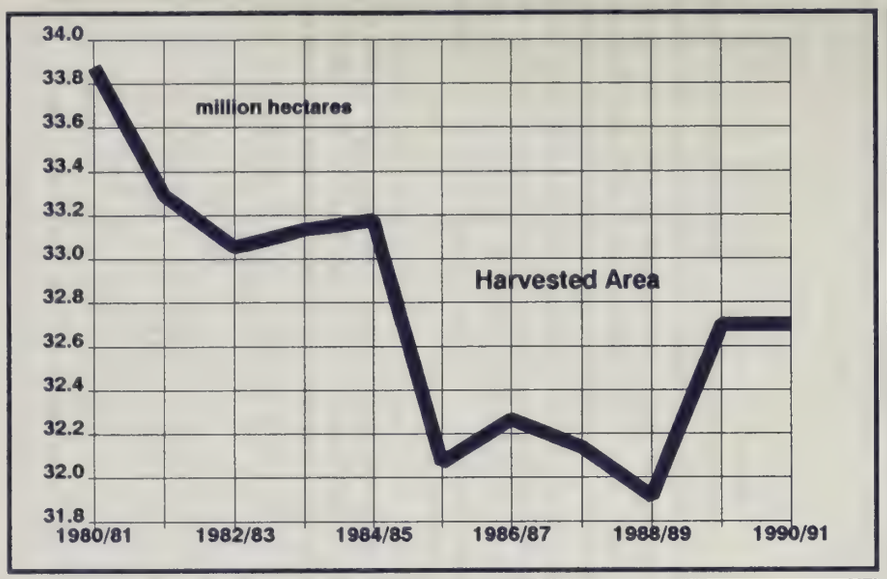
PAST AND FUTURE

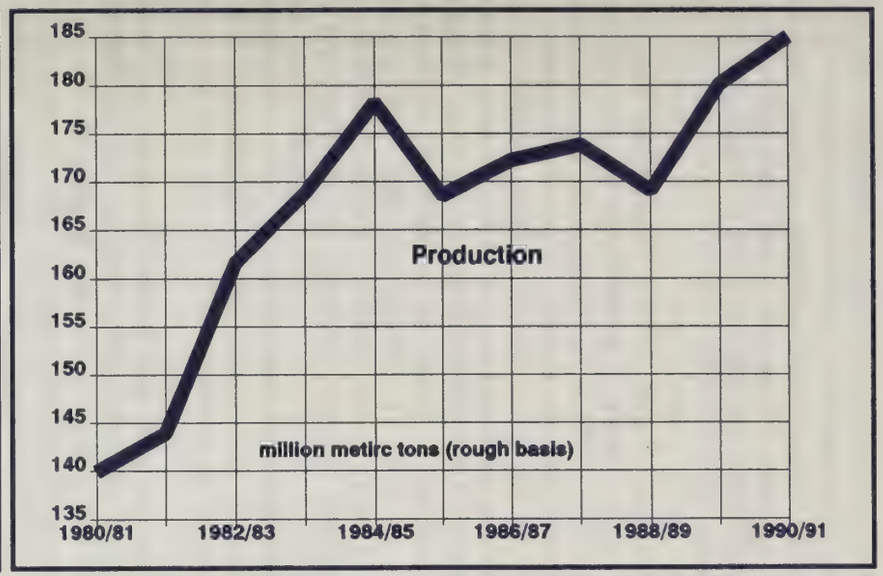
China's efforts over the years to increase its rice production have been remarkably successful. China increased its rice output (rough basis) by more than 45 million tons (32 percent) between 1980 and 1990, while its population increased by about 150 million people (15 percent) during the same period. The population is expected to grow by an equal amount by the year 2000. Although China is now basically self-sufficient in rice, it will be a major challenge to increase production fast enough to keep pace with its growing population. Since rice area is gradually declining, any production increases will have to come from higher yields. This will be possible only through the continued expansion of area planted to hybrid varieties, an increase in the production and application of fertilizer and other inputs, and price incentives to encourage farmers to continue to invest their land and energies in rice production.

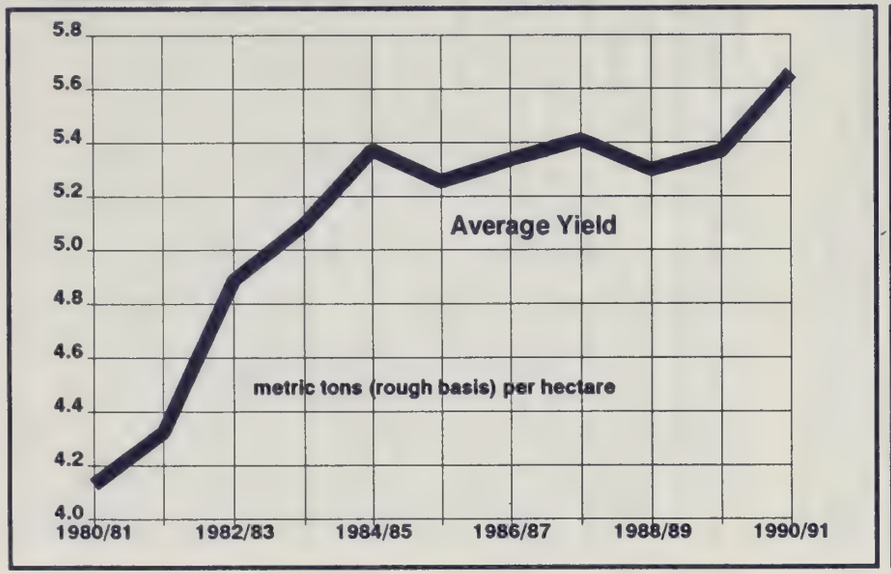
Paulette Sandene (202) 475-5133

CHART 1

Chinese Rice Production







Chinese Rice Data

	Mil. Ha Harvested Area	Mt/Ha Yield	MMT/Rough Production
1980/81	33.88	4.13	139.91
1981/82	33.29	4.32	143.95
1982/83	33.06	4.89	161.60
1983/84	33.14	5.10	168.87
1984/85	33.18	5.37	178.26
1985/86	32.07	5.26	168.57
1986/87	32.27	5.34	172.22
1987/88	32.14	5.41	173.88
1988/89	31.91	5.30	169.11
1989/90	32.70	5.37	180.13
1990/91	32.70	5.66	185.00

May 1991

Production Estimates & Crop Assessment Division, FAS, USDA

WORLD CENTRIFUGAL SUGAR PRODUCTION

The first forecast for 1991/92 world centrifugal sugar production is 112.6 million tons (raw value), nearly the same as the 1990/91 record level, which has been revised upward by 2.1 million tons. World sugar production from cane is forecast at 72.5 million tons, 1 percent more than the 71.6 million produced in 1990/91, while sugar from beets is set at 40.1 million, down 3 percent from the 41.2 million produced in 1990/91.

The European Community (EC) accounts for 15 percent of the world's total sugar production. EC output is forecast to decrease 2 percent from 1990/91, as a result of an expected reduction of 87,000 hectares in harvested area. With unification, Germany has become western Europe's most important sugar manufacturer producing 4.67 million metric tons in 1990/91. German sugar output for 1991/92 is expected to decrease 1 percent (70,000 tons) from the 90/91 crop. Sugarbeet area is forecast to drop by 8 percent even though planting conditions were favorable and soil moisture sufficient. More importantly, the farmers in eastern Germany will begin to use high-yielding monogerm varieties and yields will likely reach western Germany standards within a few years as the technology gap closes. The sugar processing industry in the former East Germany is run-down and all 42 factories are expected to close and be replaced by eight to ten modern plants as early as 1994. The four major sugar companies in the former West Germany have taken over the majority of the eastern German factories.

In France, the second largest producer in the EC, sugar outturn is forecast down 6 percent because of a 19,000 hectare decrease in area. The reduction in area is a result of reduced production of non-quota (C) sugar in response to depressed world sugar prices. Improved sugarbeet varieties and better cultural and industrial practices, combined with high EC support prices for sugar, have caused French sugarbeet yields to rise about 40 percent in the past twenty-five years from an average of 6.98 MT per hectare to 10.0 tons for the 1990/91 crop.

In India, the world's largest sugar producer, outturn for the 1991/92 season is forecast at 12.7 million tons, 2 percent less than last year's record outturn. Following the second year of record sugar production, the Indian sugar industry is at a cross roads. High state government mandated prices for sugarcane and stable federal government controlled release prices for sugar, have placed many mills in tight financial conditions, resulting in a build-up in arrearages in mill payments to farmers. The mills are unable to both pay off growers and perform necessary upkeep because they are financially weak. This condition will require both a measure of output price relief and another good cane crop, since the state governments no longer have sufficient funds to bail out the industry as they have in the past.

The outlook for the 1991/92 season in India appears to be fairly good as weather remains favorable for plant development. An estimated 80 to 85 percent of total area under sugarcane is irrigated. Area planted has remained stable as mandatory prices paid for sugarcane remain high. However, great concern remains about the financial health of the industry and its ability to repay farmers. Defaults by the mills could lead to a decrease in sugarcane production in the future. In addition to the milled centrifugal white sugar produced, khandsari and gur compete with sugar mills for sugarcane. Gur, a crystallized brown-type sugar, is produced and consumed by rural people. Khandsari, a native semi-white centrifugal sugar, continues popular with Indian consumers because it is marginally cheaper than milled sugar. Of these two types, only Khandsari is included in total centrifugal production.

In the Soviet Union, the world's second largest producer of sugar, the 1991/92 forecast is down 2 percent from a year earlier. The decline is attributed to reduced sugarbeet area. Sugarbeet production dropped dramatically last year due to reduced sown area, competition with other crops for limited resources, and lack of storage facilities. Of extreme importance was the lack of plant protectants and fertilizers of which the sugarbeet sector is a primary user. It would appear that the government has not taken significant steps to solve these problems for the 1991/92 season. The severe lack of hard currency reserves has limited the amount of inputs the Soviet Union can purchase from overseas suppliers. Some Soviet agricultural experts have estimated that the drop in Soviet production inputs, coupled with no increase in imports, may severely affect sugarbeet production and could result in a large drop in sugarbeet output for the upcoming season. Further, there are indications that overall deliveries of agricultural machinery decreased by 10 percent in 1990 and are expected to decrease another 10 percent in 1991. The lack of machinery, spare parts, fuel, labor, and storage are expected to continue into the current season. The problem of inadequate and poor quality seed supplies continue to restrict yields.

The 1991/92, Brazil's sugar crop is forecast to remain at the same level as a year ago, though up more than a 100,000 tons from the 1989/90 crop. The government of Brazil is expected to announce its 1991/92 (June-May) sugar and alcohol production plan soon. Brazil's Central-South Region, accounting for about 70 percent of the country's sugar production, will begin to harvest sugarcane in mid-May. This region had favorable weather during the past several months. Favorable growing conditions have also occurred in the Northeast region, which will begin harvest in September. The country's maximum industrial capacity is set at 11 million tons of sugar and 15 million cubic meters (MCM) of ethanol production. The current ethanol utilization pattern includes 74 percent hydrated ethanol and 18 percent anhydrous ethanol for gasoline admixing. The Persian Gulf conflict has led officials to reconsider recent lack of support for the 15-year old alcohol program. It now appears that this program could soon include a new expansion plan to increase installed industrial capacity to 16 MCM.

Sugar production in Asia is forecast to increase in five of the six major producing countries. India, as discussed above, is expected to be down. In China, the fifth largest sugar producer in the world, output is forecast up by 3 percent surpassing last year's record harvest by 200,000 tons. Sugar from sugarbeets and sugarcane is each forecast to be up about 100,000 tons to 1.4 million tons and 5.4 million respectively. Continued improvements in inputs and expansion of crop area are the principle reasons for the expanded output. Sugarbeet area is expected to expand significantly, while cane area is likely to expand at a lesser rate. Continued improvements in irrigation and fertilizer distribution, and the increased use of more sophisticated crushing and refining equipment should contribute to expand sugar production in 1991/92. The government plans to expand yields of sugarcane and sugarbeet through better production techniques and more effective use of inputs as opposed to expanding sugar area. By the year 2000, an increase in yields of sugar crops by 20 percent and extraction rates to increase by 8.5 percent to 10 percent are planned.

In Thailand, the 1991/92 forecast is up 3 percent from the 1990/91 season and down 1 percent from the record high outturn in 1988/89. The Royal Thai government actively supports both sugarcane growers and sugar millers. Attractive world market prices last season, combined with readily available production loans, encouraged a 19-percent increase in area harvested, but with prices dropping below 10 cents per pound, little area expansion is expected for 1991/92. Planted area has doubled in the Lower-North and increased 88 percent in the northeast over the past 9 years due largely to movement into those areas of several large sugar mills. Many farmers in the Northeast and Lower-North have switched from cassava, corn, and soybeans to sugarcane in reaction to the arrival of the mills and last year's increased sugar prices. Some forest land also is being converted to sugarcane production. The milling season generally starts in mid-to-late November and continues until April. Harvesting usually starts when the cane is 10-12 months old.

In the Philippines, the sugar production is forecast for 1991/92 to be up 7 percent from last season and harvested area is expected to be 9 percent (30,000 hectares) more than a year ago. Higher domestic sugar prices and increased consumption are expected to provide expansion stimulus, complemented by the increased availability of higher yielding sugarcane varieties. The reduced threat of land reform and fewer law and order problems are providing additional support for the projected expansion. Further, new cane areas in Mindanao are expected to help offset the shrinking traditional lands of Luzon, especially around the Metro Manila area where sugarcane area is increasingly diverted to industrial parks and residential use. Fallowed Negros sugarcane area is also expected to be brought back into production. The Negros/Panay area continues to lead the country in terms of area planted and sugar production. After 4 years of increasing output from existing capacity, the Philippine sugar milling industry is experiencing modest expansion and modernization in response to the upward trend in sugarcane production and sugar consumption. An unusually strong, dry typhoon which struck the major sugarcane area of Negros in mid-November 1990 resulted in a loss initially estimated at about 15,000 hectares. However, it now appears that the cane which was earlier thought to be lost was either salvaged or re-rooted.

In Indonesia, the forecast of 2.18 million tons of sugar for the 1991/92 season is only slightly above the previous year. The most important factors affecting sugarcane production in Indonesia are: 1) conversion of irrigated cane-producing areas on Java to rice production; and 2) the development of the sugar industry on islands other than Java, especially in eastern Indonesia. The government of Indonesia's highest priority agricultural remains focused on self-sufficiency in rice production. The pace of conversion from sugar to rice production on Java has been measured in small increments due to continued attractive producer prices of sugar and the high costs of relocating sugarcane production to largely unimproved land of lower fertility. The Government of Indonesia's goal for converting irrigated land from sugarcane to rice for the coming year is about 20,000 hectares. Since 1982, about 70,000 hectares of land has been developed for sugarcane outside of Java. Approximately 100,000 hectares of land outside Java had been identified as suitable for sugar cane production by the Indonesian Sugar Council. The production cycle of sugarcane in Indonesia is usually 12-14 months.

In Mexico, the forecast for 1991/92 sugar production is 3.45 million metric tons, up 1 percent from last year. However, Mexico is expected to continue to experience production shortages. Mexico has become a major sugar importer due to reduced sugarcane production, reduced subsidies, the privatization process of the sugar milling industry, and low sugarcane prices to growers. Harvested area is not expected to increase significantly until sugarcane prices to growers are increased above current levels. Production costs have risen faster than the producer agreement price over the past year.

In South Africa, sugar production for 1991/92 is forecast to show a 5-percent increase in output, as yields are forecast to return to near normal averages, although a slight decrease in harvested area is expected. The South African sugar industry has been losing sugarcane area over the past few years. The fall in total area planted is a continuation of the trend which began in 1984. The introduction of the two pool pricing system in 1985, and more recently, inroads made by the timber industry, has caused a continuation of the trend resulting in an area decline of about 8 percent since 1984.

In Australia, sugar output is forecast up 4 percent from a year ago. The Australian sugar industry is currently undergoing its first major expansion in area since 1981. Since 1989, existing growers have had the opportunity to expand their land assignments and new growers have entered the industry. Heavy rains in the Burdekin and Mackay districts caused some early damage to the 1991/92 crop, however, rains have generally been beneficial.

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TABLE 9

WORLD CENTRIFUGAL SUGAR PRODUCTION
1988/89 - 1991/92 1/

COUNTRY/REGION	1988/89	1989/90	1990/91 2/	1991/92 3/
	(1,000 Metric Tons)			
NORTH AMERICA				
Canada	104	121	138	130
Mexico	3,678	3,100	3,400	3,450
United States 2/ 4/	6,089	6,008	6,228	6,622
SUBTOTAL	9,871	9,229	9,766	10,202
SOUTH AMERICA				
Argentina	1,284	944	1,240	1,350
Bolivia	162	180	225	230
Brazil	8,582	7,793	7,900	7,900
Chile	446	448	370	350
Colombia	1,435	1,611	1,642	1,665
Ecuador	315	331	352	360
Guyana	165	130	137	160
Paraguay	105	120	100	110
Peru	626	620	560	520
Surinam	1	1	1	1
Uruguay	85	75	70	70
Venezuela	513	500	494	480
SUBTOTAL	13,719	12,753	13,091	13,196
CENTRAL AMERICA				
Belize	92	102	102	100
Costa Rica	224	245	250	260
El Salvador	174	211	273	260
Guatemala	705	875	957	900
Honduras	184	199	212	220
Nicaragua	158	198	260	280
Panama	109	119	120	120
SUBTOTAL	1,646	1,949	2,174	2,140
CARIBBEAN				
Barbados	66	69	80	80
Cuba	8,100	8,000	7,800	7,800
Dominican Republic	735	636	640	660
Guadeloupe	90	42	70	75
Haiti	40	35	30	30
Jamaica	192	229	240	240
Martinique	2	2	4	5
Puerto Rico	83	62	61	65
St. Kitts - Nevis	32	25	15	20
Trinidad and Tobago	97	118	120	120
SUBTOTAL	9,437	9,218	9,060	9,095
EEC				
Belgium-Luxembourg	1,005	1,039	1,119	1,035
Denmark	550	529	591	550
France 5/	4,372	4,204	4,744	4,480
Germany	3,578	4,087	4,670	4,600
Greece	235	421	315	340
Ireland	212	233	245	230
Italy	1609	1880	1587	1700
Netherlands	1074	1241	1339	1260
Portugal	2	2	2	4
Spain	1289	1037	1036	1090
United Kingdom	1417	1377	1348	1370
SUBTOTAL	15,343	16,050	16,996	16,659
OTHER WEST EUROPE				
Austria	358	457	451	490
Finland	154	168	176	130
Sweden	375	401	419	300
Switzerland	150	152	160	150
SUBTOTAL	1,037	1,178	1,206	1,070

FOOTNOTES AT END OF TABLE

CONTINUED

MAY 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 9 (Continued)

WORLD CENTRIFUGAL SUGAR PRODUCTION
1988/89 - 1991/92 1/

COUNTRY/REGION	1988/89	1989/90	1990/91 2/	1991/92 3/
	(1,000 Metric Tons)			
EAST EUROPE				
Albania	40	30	25	20
Bulgaria	80	70	40	50
Czechoslovakia	700	750	700	700
Hungary	513	630	600	650
Poland	1,825	1,865	2,174	1,750
Romania	425	499	334	310
Yugoslavia	660	930	885	820
SUBTOTAL	4243	4774	4758	4300
USSR	8,900	9,530	9,160	9,000
NORTH AFRICA				
Algeria	11	11	11	11
Egypt	945	957	985	975
Morocco	527	494	519	550
Sudan	360	420	480	450
Tunisia	30	35	30	30
SUBTOTAL	1,873	1,917	2,025	2,016
OTHER AFRICA				
Angola	35	35	35	35
Benin	4	4	5	5
Burkina	20	20	20	20
Burundi	4	8	10	10
Cameroon	35	40	40	40
Chad	20	20	20	20
Congo (Brazzaville)	35	35	35	35
Cote d' Ivorie	146	164	180	180
Ethiopia	169	183	190	200
Gabon	20	20	20	20
Ghana	10	10	5	5
Guinea	25	25	25	25
Kenya	411	441	430	430
Madagascar	120	125	125	125
Malawi	185	175	200	180
Mali	20	20	20	20
Mauritius	672	602	661	650
Mozambique	25	30	35	40
Nigeria	53	53	59	60
Reunion	262	178	200	220
Rwanda	5	5	5	5
Senegal	60	60	60	60
Sierra Leone	5	6	6	8
Somalia	45	35	40	40
South Africa	2,240	2,289	2,165	2,265
Swaziland	462	501	521	510
Tanzania	101	95	105	105
Togo	4	4	5	5
Uganda	10	30	30	30
Zaire	60	60	60	60
Zambia	150	140	140	140
Zimbabwe	459	502	492	440
SUBTOTAL	5,872	5,915	5,944	5,988
MIDDLE EAST				
Iran	630	600	700	700
Iraq	10	10	10	10
Lebanon	6	6	6	6
Syria	30	41	43	40
Turkey	1,410	1,380	1,900	1,750
SUBTOTAL	2,086	2,037	2,659	2,506

FOOTNOTES AT END OF TABLE

CONTINUED

MAY 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 9 (Continued)

WORLD CENTRIFUGAL SUGAR PRODUCTION
1988/89 - 1991/92 1/

COUNTRY/REGION	1988/89	1989/90	1990/91 2/	1991/92 3/
	(1,000 Metric Tons)			
OTHER ASIA				
Afghanistan	10	10	10	10
Bangladesh	117	196	192	190
Burma	50	50	50	50
China	5,312	5,618	6,600	6,800
India 6/	10,150	12,085	12,920	12,700
Indonesia	1,920	2,080	2,130	2,180
Japan	984	988	925	960
Malaysia	100	105	96	110
Nepal	17	17	17	17
Pakistan	1,980	1,987	2,285	2,300
Philippines	1,600	1,750	1,770	1,900
Sri Lanka	35	35	35	35
Taiwan	664	511	530	550
Thailand	4,055	3,502	3,900	4,000
Vietnam	400	450	500	500
SUBTOTAL	27,394	29,384	31,960	32,302
OCEANIA				
Australia	3,680	3,797	3,515	3690
Fiji	363	461	420	400
Papua New Guinea	30	30	30	30
SUBTOTAL	4,073	4,288	3,965	4,120
WORLD TOTAL	105,494	108,222	112,764	112,594

1/ One-half of the crop years are on a September/August basis. Crop years for Southern Hemisphere countries begin prior to September. Factors for converting from refined to raw sugar are 1.087 for refined beet sugar and 1.07 for refined cane sugar.
2/ Preliminary. Revised U.S. Production estimates will be released on May 29, 1991.
3/ Forecast.
4/ United States data include continental beet and cane and Hawaii cane sugar, but exclude Puerto Rico cane sugar which is listed separately.
5/ French data exclude production of cane sugar in Guadeloupe, Martinique, and Reunion which are listed separately.
6/ Indian data include production of Khandsari sugar, a native type, semi-white centrifugal sugar. Estimated output of Khandsari sugar in thousand tons is as follows: 1989/90 - 336; 1990/91 - 398; 1991/92 - 400.

MAY 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 10

SUGARCANE AREA HARVESTED, YIELD AND PRODUCTION
BY
SELECTED SUGARCANE PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVEST	SUGAR CANE YIELD	SUGAR CANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	------1,000 MT---------		PERCENT	MT/HA
Argentina 2/						
1989/90	240	44.2	10,606	944	8.9	3.93
1990/91	265	47.2	12,500	1,240	9.9	4.68
1991/92 MAY	280	50.0	14,000	1,350	9.6	4.82
Australia						
1989/90	331	83.3	27,562	3,797	13.8	11.47
1990/91	340	73.9	25,140	3,515	14.0	10.34
1991/92 MAY	350	77.0	26,950	3,690	13.7	10.54
Brazil						
1989/90	1,210	60.3	73,000	7,793	10.7	6.44
1990/91	1,170	64.1	75,000	7,900	10.5	6.75
1991/92 MAY	1,220	61.5	75,000	7,900	10.5	6.48
China 2/						
1989/90	959	50.9	48,795	4,851	9.9	5.06
1990/91	965	59.3	57,270	5,300	9.3	5.49
1991/92 MAY	970	56.7	55,000	5,400	9.8	5.57
Colombia						
1989/90	113	123.9	14,000	1,611	11.5	14.26
1990/91	115	123.5	14,200	1,642	11.6	14.28
1991/92 MAY	116	122.8	14,250	1,665	11.7	14.35
Cuba						
1989/90	1,350	51.9	70,000	8,000	11.4	5.93
1990/91	1,350	50.0	67,500	7,800	11.6	5.78
1991/92 MAY	1,400	50.0	70,000	7,800	11.1	5.57
Dominican Republic						
1989/90	215	30.4	6,540	636	9.7	2.96
1990/91	219	33.1	7,240	640	8.8	2.92
1991/92 MAY	220	35.5	7,800	660	8.5	3.00
Egypt 2/						
1989/90	91	95.6	8,700	887	10.2	9.75
1990/91	90	95.6	8,600	890	10.3	9.89
1991/92 MAY	88	95.5	8,400	875	10.4	9.94
Fiji						
1989/90	60	68.2	4,089	461	11.3	7.68
1990/91	60	67.0	4,020	420	10.4	7.00
1991/92 MAY	60	67.0	4,020	400	10.0	6.67
Guatemala						
1989/90	115	75.8	8,712	875	10.0	7.61
1990/91	120	79.4	9,526	957	10.0	7.98
1991/92 MAY	120	75.0	9,000	900	10.0	7.50

FOOTNOTES AT END OF TABLE

CONTINUED

MAY 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 10 (Continued)

SUGARCANE AREA HARVESTED, YIELD AND PRODUCTION
BY
SELECTED SUGARCANE PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVEST	SUGAR CANE YIELD	SUGAR CANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	------1,000 MT---------		PERCENT	MT/HA
India						
1989/90	1,745	67.0	117,000	12,085	10.3	6.93
1990/91	1,895	66.0	125,000	12,920	10.3	6.82
1991/92 MAY	1,870	64.2	120,000	12,700	10.6	6.79
Indonesia						
1989/90	340	79	26,850	2,080	7.7	6.12
1990/91	365	76.9	28,070	2,130	7.6	5.84
1991/92 MAY	380	76.3	29,000	2,180	7.5	5.74
Mauritius						
1989/90	80	75.0	6,000	602	10.0	7.53
1990/91	80	75.0	6,000	661	11.0	8.26
1991/92 MAY	80	75.0	6,000	650	10.8	8.13
Mexico						
1989/90	511	68.1	34,800	3,100	8.9	6.07
1990/91	525	68.6	36,000	3,400	9.4	6.48
1991/92 MAY	530	67.9	36,000	3,450	9.6	6.51
Pakistan 2/						
1989/90	496	41.3	20,500	1,957	9.5	3.95
1990/91	540	43.5	23,500	2,250	9.6	4.17
1991/92 MAY	540	46.3	25,000	2,260	9.0	4.19
Peru						
1989/90	45	135.6	6,100	620	10.2	13.78
1990/91	46	134.8	6,200	560	9.0	12.17
1991/92 MAY	46	130.4	6,000	520	8.7	11.30
Philippines						
1989/90	310	62.4	19,350	1,750	9.0	5.65
1990/91	310	64.5	20,000	1,770	8.9	5.71
1991/92 MAY	340	61.8	21,000	1,900	9.0	5.59
South Africa						
1989/90	272	68.5	18,636	2,289	12.3	8.42
1990/91	275	66.2	18,198	2,165	11.9	7.87
1991/92 MAY	270	70.2	18,950	2,265	12.0	8.39
Sudan						
1989/90	40	112.5	4,500	420	9.3	10.50
1990/91	50	100.0	5,000	480	9.6	9.60
1991/92 MAY	50	100.0	5,000	450	9.0	9.00
Swaziland						
1989/90	37	159.0	5,882	501	8.5	13.54
1990/91	37	162.2	6,000	521	8.7	14.08
1991/92 MAY	37	162.2	6,000	510	8.5	13.78

FOOTNOTES AT END OF TABLE

CONTINUED

MAY 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 10 (Continued)

SUGARCANE AREA HARVESTED, YIELD AND PRODUCTION
BY
SELECTED SUGARCANE PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVEST	SUGAR CANE YIELD	SUGAR CANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	------1,000 MT---------		PERCENT	MT/HA
Taiwan						
1989/90	61	86.6	5,283	511	9.7	8.38
1990/91	61	88.5	5,400	530	9.8	8.69
1991/92 MAY	61	90.2	5,500	550	10.0	9.02
Thailand						
1989/90	688	48.8	33,560	3,502	10.4	5.09
1990/91	820	47.6	39,000	3,900	10.0	4.76
1991/92 MAY	820	47.6	39,000	4,000	10.3	4.88
U.S.(Hawaii) 4/						
1989/90	30	214.2	6,425	771	12.0	25.70
1990/91	28	221.0	6,189	774	12.5	27.64
1991/92 MAY	27	210.9	5,695	739	13.0	27.37
U.S.(Mainland) 2/						
1989/90	295	64.5	19,039	2,093	11.0	7.09
1990/91	265	65.0	17,235	1,979	11.5	7.47
1991/92 MAY	309	65.8	20,322	2,345	11.5	7.59
Venezuela						
1989/90	110	66.2	7,282	500	6.9	4.55
1990/91	100	63.5	6,346	494	7.8	4.94
1991/92 MAY	95	63.2	6,000	480	8.0	5.05
Zimbabwe						
1989/90	35	109.0	3,816	502	13.2	14.34
1990/91	35	100.7	3,525	492	14.0	14.06
1991/92 MAY	35	91.4	3,200	440	13.8	12.57
MAJOR CANE PRODUCERS						
1989/90	9,779	62.1	607,027	63,138	10.4	6.46
1990/91	10,126	62.5	632,659	65,330	10.3	6.45
1991/92 MAY	10,314	61.8	637,087	66,079	10.4	6.41
OTHERS						
1989/90	1,193	57.7	68,807	5,958	8.7	4.99
1990/91	1,245	58.3	72,615	6,265	8.6	5.03
1991/92 MAY	1,258	57.8	72,671	6,423	8.8	5.11
WORLD						
1989/90	10,972	61.6	675,834	69,096	10.2	6.30
1990/91	11,371	62.0	705,274	71,595	10.2	6.30
1991/92 MAY	11,572	61.3	709,758	72,502	10.2	6.27

1/ Refined cane sugar is converted to raw value by a factor of 1.07.
2/ Produces beet sugar as well as cane sugar. 3/ Includes Khandsari (native type semi-white centrifugal sugar. 4/ Hawaiian cane is harvested once every 24 months, consequently yields per hectare are much higher than in countries where cane is harvested every year.

MAY 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 11

SUGARBEET AREA HARVESTED, YIELD AND PRODUCTION
BY
SELECTED SUGARBEET PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVEST	BEET YIELD	SUGAR BEET PRODUCTION	SUGAR RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	-----1,000 MT--------		PERCENT	MT/HA
Austria						
1989/90	47	56.2	2,641	457	17.3	9.72
1990/91	50	49.9	2,494	451	18.1	9.02
1991/92 MAY	51	52.9	2,700	490	18.1	9.61
Belgium_Luxembourg						
1989/90	111	59.8	6,640	1,039	15.6	9.36
1990/91	112	65	7,280	1,119	15.4	9.99
1991/92 MAY	107	60.7	6,500	1,035	15.9	9.67
China 2/						
1989/90	569	16.2	9,243	767	8.3	1.35
1990/91	730	19.9	14,530	1,300	8.9	1.78
1991/92 MAY	750	20	15,000	1,400	9.3	1.87
Czechoslovakia						
1989/90	208	36.1	7,500	750	10.0	3.61
1990/91	208	36.1	7,500	700	9.3	3.37
1991/92 MAY	208	36.1	7,500	700	9.3	3.37
Denmark						
1989/90	67	49.4	3,309	529	16.0	7.90
1990/91	66	55.8	3,685	591	16.0	8.95
1991/92 MAY	67	47.8	3,200	550	17.2	8.21
France						
1989/90	427	56.0	23,915	4,204	17.6	9.85
1990/91	474	52.4	24,850	4,744	19.1	10.01
1991/92 MAY	455	54.7	24,900	4,480	18.0	9.85
Germany						
1989/90	609	81.3	26,901	4,087	15.2	6.71
1990/91	619	90.6	30,310	4,670	15.4	7.54
1991/92 MAY	570	52.6	30,000	4,600	15.3	8.07
Hungary						
1989/90	115	38.3	4,400	630	14.3	5.48
1990/91	115	38.3	4,400	600	13.6	5.22
1991/92 MAY	115	43.5	5,000	650	13.0	5.65
Italy						
1989/90	290	57.2	16,600	1,880	11.3	6.48
1990/91	262	44.3	11,600	1,587	13.7	6.06
1991/92 MAY	260	53.8	14,000	1,700	12.1	6.54
Japan 2/						
1989/90	72	50.9	3,664	667	18.2	9.26
1990/91	72	55.5	3,994	700	17.5	9.72
1991/92 MAY	72	53.3	3,840	690	18.0	9.58
Netherlands						
1989/90	128	56.3	7,208	1,241	17.2	9.70
1990/91	125	69.7	8,707	1,339	15.4	10.71
1991/92 MAY	125	60.0	7,500	1,260	16.8	10.08

FOOTNOTES AT END OF TABLE

CONTINUED

May 1991 Production Estimates and Crop Assessment Division FAS,USDA

TABLE 11 (Continued)

SUGARBEET AREA HARVESTED, YIELD AND PRODUCTION
BY
SELECTED SUGARBEET PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVEST	BEET YIELD	SUGAR BEET PRODUCTION	SUGAR RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	-----1,000 MT--------		PERCENT	MT/HA
Poland						
1989/90	423	34.0	14,374	1,865	13.0	4.41
1990/91	440	38.0	16,700	2,174	13.0	4.94
1991/92 MAY	400	33.8	13,500	1,750	13.0	4.38
Romania						
1989/90	243	26.5	6,432	499	7.8	2.05
1990/91	155	20.1	3,114	334	10.7	2.15
1991/92 MAY	138	20.7	2,850	310	10.9	2.25
Spain 2/						
1989/90	160	44.8	7,172	1,023	14.3	6.39
1990/91	160	45.4	7,265	1,020	14.0	6.38
1991/92 MAY	170	47.1	8,000	1,075	13.4	6.32
Turkey						
1989/90	350	31.2	10,930	1,380	12.6	3.94
1990/91	370	35.1	13,000	1,900	14.6	5.14
1991/92 MAY	355	33.8	12,000	1,750	14.6	4.93
U.S.S.R.						
1989/90	3,344	29.1	97,414	9,530	9.8	2.85
1990/91	3,267	24.9	81,400	9,160	11.3	2.80
1991/92 MAY	3,260	26.1	85,000	9,000	10.6	2.76
United Kingdom						
1989/90	194	41.2	8,000	1,377	17.2	7.10
1990/91	192	41.7	8,000	1,348	16.9	7.02
1991/92 MAY	170	46.2	7,850	1,370	17.5	8.06
United States 2/						
1989/90	524	43.5	22,800	3,144	13.8	6.00
1990/91	558	44.9	25,032	3,475	13.9	6.23
1991/92 MAY	555	46.0	25,515	3,538	13.9	6.37
Yugoslavia						
1989/90	142	47.9	6,797	930	13.7	6.55
1990/91	158	37.4	5,915	885	15.0	5.60
1991/92 MAY	138	39.9	5,500	820	14.9	5.94
MAJOR BEET PRODUCERS						
1989/90	1,117	29.4	32,818	4,011	12.2	3.59
1990/91	1,318	30.8	40,567	4,905	12.1	3.72
1991/92 MAY	1,336	31.1	41,565	5,078	12.2	3.80
OTHERS						
1989/90	7,503	36.8	276,405	35,115	12.7	4.68
1990/91	7,408	35.4	262,435	36,264	13.8	4.90
1991/92 MAY	7,210	36.3	261,470	35,014	13.4	4.86
WORLD						
1989/90	8,620	35.9	309,223	39,126	12.7	4.54
1990/91	8,726	34.7	303,002	41,169	13.6	4.72
1991/92 MAY	8,546	35.5	303,035	40,092	13.2	4.69

1/ Refined beet sugar is converted to raw value by a forecast of 1.087.
2/ Produces cane sugar as well as beet sugar.

May 1991 Production Estimates and Crop Assessment Division, FAS, USDA

DAIRY PRODUCTION FORECASTS FOR SELECTED COUNTRIES

Revised forecasts for 16 selected countries, accounting for about three-quarters of the world dairy production, indicate prospects for 1991 have declined slightly since November, 1990. Milk production in the 16 countries is forecast at 333 million tons, while the November forecasts indicated production just above that level. Compared to November, milk output forecasts for Italy, the Soviet Union, China, and New Zealand were revised downward, while forecasts for the United Kingdom and Japan were moved higher. The 1991 butter production forecast is down nearly 2 percent, while cheese output is essentially unchanged and the manufacture of nonfat dry milk is forecast to show a small increase when compared to November 1990 projections.

In the United States, 1991 milk production is forecast at 68.1 million tons, up 1 percent from 1990 and unchanged from the November forecast. Canadian milk production and cow numbers are forecast to decline again in 1991 reflecting a 3 percent decline in the quota for processing milk deliveries. Mexico's 1991 milk output is now forecast at 9.9 million tons, 6 percent above 1990 and the same as the November forecast. More milk is being produced in tropical regions of the country as producers upgrade the genetic potential of their herds.

Forecast milk production in the 6 EC countries reviewed is down slightly from last year and from the November forecast. French milk production is forecast at 26.6 million tons, unchanged from the November forecast but 1 percent below last year's production level. Output in Germany is forecast at 30.5 million tons, unchanged from November, but sharply below the 1990 level as the eastern region adapts to market conditions and EC quotas. Milk output in Italy is forecast at 10.5 million tons, below both the November forecast and the 1990 level. The Government of Italy has implemented a program to take an extra 100,000 cows out of production. Ireland's milk output is forecast to decline nearly 2 percent in 1991 reflecting the expected change in its quota.

Final 1990 milk production for the USSR was slightly below the November estimate as problems in the general economy also affected the dairy sector. Little or no growth is forecast for 1991. Japan's 1990 milk production was stronger than forecast in November as per cow yields continued to increase due to further genetic improvement in Japan's dairy herd. In both Australia and New Zealand, low international dairy product prices and regional dry conditions have reduced prospects for 1991 output. Milk production in New Zealand is now forecast at 7.9 million tons, down from the November forecast, but still about 1 percent above the 1990 level.

The mix of dairy product output in 1991 will be influenced by relative prices throughout the year. Up to now, prices have generally favored cheese production. Cheese output in the 16 countries reviewed is now forecast as 9.2 million tons, 2 percent above 1990 but slightly below the November forecast. Compared to the November forecasts, the United States and France, the two largest producers, were essentially unchanged. Forecast output in the USSR is down as reported 1990 output was well below the November estimate. Butter production for 1991 in the 16 countries reviewed is now forecast at 4.8 million tons, down from both 1990 and the November forecast. Changes from the November forecasts include an upward adjustment in the United States and downward adjustments in the USSR and Germany. USSR butter output during 1990 was well below the November estimate. Output of non-fat dry milk is now forecast at 2.8 million tons, about 2 percent below the 1990 level but roughly 2 percent above the November forecast. Output forecasts were increased for Ireland and the United Kingdom while the U.S. forecast was reduced.

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TABLE 12

MILK COW NUMBERS IN SELECTED COUNTRIES 1/
(In 1,000 head)

	1987	1988	1989	1990 2/	Forecast 1991 3/ Nov.	May
SELECTED COUNTRIES						
Canada	1,481	1,467	1,449	1,429	1,400	1,410
Mexico	6,300	6,200	6,300	6,410	6,450	6,450
United States	10,327	10,262	10,126	10,127	10,090	10,050
Denmark	811	774	764	770	745	769
France	6,359	5,841	5,574	5,489	5,450	5,450
Germany	7,322	7,071	6,960	6,801	6,300	6,342
Ireland	1,490	1,444	1,387	1,400	1,380	1,380
Italy	3,021	3,020	2,973	2,931	2,850	2,850
Netherlands	2,043	1,946	1,888	1,855	1,825	1,825
United Kingdom	3,311	3,166	3,142	3,224	3,200	3,205
Czechoslovakia	1,791	1,788	1,775	1,765	1,780	1,760
USSR	42,400	42,000	41,809	41,734	41,600	41,600
Japan	1,052	1,046	1,066	1,081	1,070	1,075
China (Mainland)	1,846	2,164	2,222	2,260	2,700	2,500
Australia	1,707	1,697	1,663	1,631	1,604	1,595
New Zealand	2,252	2,280	2,236	2,269	2,300	2,300
SUBTOTAL	93,513	92,166	91,334	91,176	90,744	90,561
OTHER	67,200	66,644	66,883	67,442	67,433	67,433
WORLD	160,713	158,810	158,217	158,618	158,177	157,994

1/ This is the semiannual update of the production series regularly published in the World Agricultural Production and World Dairy Situation circulars. World totals compare to those in the above mentioned circulars.
2/ Preliminary. 3/ Forecast. 4/ Year beginning July 1.
5/ Year beginning June 1.

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TABLE 13

COW MILK PRODUCTION IN SELECTED COUNTRIES 1/
(In 1,000 metric tons)

	1987	1988	1989	1990 2/	Forecast 1991 3/ Nov.	May
SELECTED COUNTRIES						
Canada	7,986	8,229	7,980	7,900	7,800	7,800
Mexico	8,971	8,830	8,970	9,330	9,900	9,900
United States	64,732	65,840	65,426	67,260	68,100	68,075
Denmark	4,860	4,739	4,747	4,742	4,730	4,640
France	27,146	26,000	26,150	26,400	26,600	26,600
Germany	32,624	32,054	32,432	31,600	30,500	30,500
Ireland	5,751	5,573	5,575	5,605	5,365	5,495
Italy	10,300	10,671	10,828	10,800	10,900	10,500
Netherlands	11,672	11,406	11,321	11,180	11,215	11,200
United Kingdom	15,360	14,880	14,647	15,016	14,850	15,090
Czechoslovakia	6,921	6,963	7,100	7,044	7,100	7,000
USSR	103,400	106,800	108,529	108,700	109,200	109,000
Japan	7,335	7,607	8,059	8,190	8,070	8,250
China (Mainland)	3,301	3,660	3,813	4,130	4,600	4,400
Australia 4/	6,367	6,297	6,465	6,435	6,490	6,397
New Zealand 5/	7,245	7,936	7,406	7,779	8,037	7,886
SUBTOTAL	323,971	327,485	329,448	332,111	333,457	332,733
OTHER	101,896	101,628	105,523	108,825	109,936	109,936
WORLD	425,867	429,113	434,971	440,936	443,393	442,669

1/ This is the semiannual update of the production series regularly published in the World Agricultural Production and World Dairy Situation circulars. World totals compare to those in the above mentioned circulars.
2/ Preliminary. 3/ Forecast 4/ Year beginning July 1.
5/ Year beginning June 1.

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TABLE 14

BUTTER PRODUCTION IN SELECTED COUNTRIES 1/
(In 1,000 metric tons)

	1987	1988	1989	1990 2/	Forecast 1991 3/ Nov.	May
SELECTED COUNTRIES						
Canada	95	105	99	101	95	100
Mexico	26	32	33	34	34	34
United States	501	547	577	583	550	570
Denmark	96	94	92	93	90	84
France	569	521	518	520	520	520
Germany	786	700	711	675	610	570
Ireland	150	139	156	151	143	144
Italy	70	71	74	72	74	70
Netherlands	234	214	213	205	200	205
United Kingdom	174	140	130	139	150	141
Czechoslovakia	149	148	156	157	155	155
USSR	1,742	1,724	1,726	1,730	1,825	1,730
Japan	69	68	78	76	79	78
Australia 4/	104	98	96	111	107	114
New Zealand 5/	248	276	246	276	274	274
SUBTOTAL	5,013	4,877	4,905	4,923	4,906	4,789
OTHER	1,606	1,690	1,802	1,874	1,883	1,883
WORLD	6,619	6,567	6,707	6,797	6,789	6,672

1/ This is the semiannual update of the production series regularly published in the World Agricultural Production and World Dairy Situation circulars. World totals compare to those in the above mentioned circulars.
2/ Preliminary. 3/ Forecast. 4/ Year beginning July 1.
5/ Year beginning June 1.

May 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 15

CHEESE PRODUCTION IN SELECTED COUNTRIES 1/
(In 1,000 metric tons)

	1987	1988	1989	1990 2/	Forecast 1991 3/ Nov.	May
SELECTED COUNTRIES						
Canada	246	252	247	250	235	252
Mexico	298	370	373	384	400	400
United States	2,424	2,527	2,546	2,739	2,890	2,880
Denmark	271	258	275	293	310	310
France	1,342	1,378	1,485	1,523	1,550	1,550
Germany	817	849	885	765	705	770
Ireland	65	75	74	72	73	69
Italy	704	737	760	755	760	740
Netherlands	552	559	568	594	615	610
United Kingdom	263	299	280	307	300	310
Czechoslovakia	142	146	152	150	149	149
USSR	861	894	900	881	930	885
Japan	25	26	27	26	27	25
Australia	177	176	190	175	188	175
New Zealand	113	128	128	122	125	125
SUBTOTAL	8,300	8,674	8,890	9,036	9,257	9,250
OTHER	1,765	1,815	1,853	1,837	1,877	1,877
WORLD	10,065	10,489	10,743	10,873	11,134	11,127

1/ This is the semiannual update of the production series regularly published in the World Agricultural Production and World Dairy Situation circulars. World totals compare to those in the above mentioned circulars.
2/ Preliminary. 3/ Forecast. 4/ Year beginning July 1.
5/ Year beginning June 1.

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TABLE 16

NONFAT DRY MILK PRODUCTION IN SELECTED COUNTRIES 1/
(In 1,000 metric tons)

	1987	1988	1989	1990 2/	Forecast 1991 3/ Nov.	May
SELECTED COUNTRIES						
Canada	110	110	93	95	87	93
Mexico	4	5	6	9	9	9
United States	480	444	397	395	390	370
Denmark	18	7	13	41	19	28
France	603	490	492	530	550	550
Germany	526	446	500	483	450	450
Ireland	129	100	140	195	160	197
Italy	0	1	0	0	0	0
Netherlands	98	87	83	67	60	62
United Kingdom	193	136	133	166	150	170
USSR	310	350	300	300	300	300
Japan	153	159	178	178	180	176
Australia	128	120	127	139	139	146
New Zealand	173	198	181	208	200	200
SUBTOTAL	2,925	2,653	2,643	2,806	2,694	2,751
OTHER	569	582	662	736	708	708
WORLD	3,494	3,235	3,305	3,542	3,402	3,459

1/ This is the semiannual update of the production series regularly published in the World Agricultural Production and World Dairy Situation circulars. World totals compare to those in the above mentioned circulars.
2/ Preliminary. 3/ Forecast. 4/ Year beginning July 1.
5/ Year beginning June 1.

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TABLE 17

CASEIN PRODUCTION IN SELECTED COUNTRIES 1/
(In 1,000 metric tons)

	1987	1988	1989	1990 2/	Forecast 1991 3/ Nov.	May
SELECTED COUNTRIES						
Denmark	17	21	19	13	16	11
France	52	61	47	26	30	30
Germany	25	25	22	16	20	20
Ireland	39	44	32	28	32	22
Netherlands	20	20	20	20	20	20
UK	1	0	1	2	1	2
Australia	8	9	7	5	5	5
New Zealand	62	66	56	62	60	60
SUBTOTAL	224	246	204	172	184	170
OTHER	22	24	32	39	35	35
WORLD	246	270	236	211	219	205

1/ This is the semiannual update of the production series regularly published in the World Agricultural Production and World Dairy Situation circulars. World totals compare to those in the above mentioned circulars.
2/ Preliminary. 3/ Forecast. 4/ Year beginning July 1.
5/ Year beginning June 1.

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WORLD COTTON PRODUCTION OUTLOOK FOR 1991/92

Important factors that influence world cotton production are the current cotton market situation, domestic and world economic conditions, government policies, and weather. Of these factors, government policies encouraging larger area, along with higher cotton prices during the past two years are providing the biggest stimuli to increased 1991/92 cotton production.

Preliminary indications are that world cotton production is forecast to rise 5 percent to a record 91.0 million bales for 1991/92. Foreign production is predicted at 75.0 million bales with foreign harvested cotton area at 29.5 million hectares, second only to the 1984/85 record of 76.0 million bales and 29.7 million hectares. The 1991/92 record world production forecast is supported by current higher cotton prices relative to last season and continued strong demand.

Production in the United States is projected at 16.0 million bales. This would be 3 percent above last year and the largest crop since 1953/54 when output reached 16.4 million bales. Major uncertainties in the outlook include recent dry soil conditions in West Texas, wet and flooded soil conditions in the Delta, and reduced reservoir levels in California.

In China, as in the past, production increases are needed so that it can maintain its role as a major exporter of both raw cotton and textiles while meeting its rapidly rising domestic consumption requirements. The government has indicated that the goal for the eighth five-year-plan (1991-95) is to produce 21 to 23 million 480-pound-bales per year. In line with this, China is expected to continue its push to increase cotton production for 1991/92.

Cotton production in the Soviet Union for 1991/92 is affected by two opposing forces: the need to earn hard currency and the need to provide more food production and protect the environment. The strongest argument for area expansion revolves around current, relatively, high world cotton prices and the pressure to earn foreign exchange by means of cotton exports. However, cotton production next season is expected to be slightly below the estimated 12.0 million 480-pound-bales for 1990/91.

In Mexico, cotton production for 1991/92 is anticipated to rebound to a more normal level. The expected output increase is due to high reservoir levels and cropping alternatives that favor cotton. In Central America, production could rise moderately for the coming season because of attractive cotton prices. However, foreign exchange needs and input cost will largely determine cotton output levels. South American cotton output for 1991/92, with farming operations beginning in 5 to 6 months, could increase by about one-tenth over 1990/91. However, the higher output is based upon a more timely release of production financing than occurred at the outset of 1990/91.

In South Asia, cotton production should push slightly above 1990/91. Pakistan's cotton production for the 1991/92 season is being influenced by this year's higher cotton prices along with a continued strong domestic demand from the expanding textile industry. However, area expansion is constrained by the lack of available land in the major cotton producing region. In India, production is expected to be higher than the disappointing output of 1990/91. Domestic supply is tight and cotton prices have remained high. Both conditions bode well for higher output. In Australia, production for next year is expected to be as large as the current crop if cotton prices remain strong as planting time nears in September-October and sufficient soil moisture is available to maintain this year's level of dryland seeding.

In Turkey, cotton production is expected to be down from last season as farmers switch from cotton to other crops. This change is reflected in the shift in government policy not to include cotton in the government's support program. Syria plans to increase production. However, the level of output will depend upon the severity of the current drought and its impact on the availability of irrigation water.

A moderate increase is forecast for cotton production in Africa. Many of the cotton producing countries depend very heavily on cotton exports for sorely needed foreign exchange earnings. Because of this need, there is strong support for the cotton sector in West Africa. This is particularly true for Cote d'Ivoire, Mali, Benin, Cameroon, and Burkina. The Egyptian Government would like to expand cotton production. However, the major constraint to production continues to be the lack of incentive due to the low procurement price and favorable crop alternatives. In Sudan, it appears that production will be about the same as last year. Zimbabwe is anticipated to increase output as the government has raised producer prices. South African area is expected to rebound from the 1990 drought-reduced area.

Cotton production in the European Community (EC) is likely be slightly below last year's level as alternative crops are more favorable. Greece, the largest EC producer, is expected to shift at least 8 percent of its area to corn.

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CHART 2

1991/92 Forecast of World Cotton Production

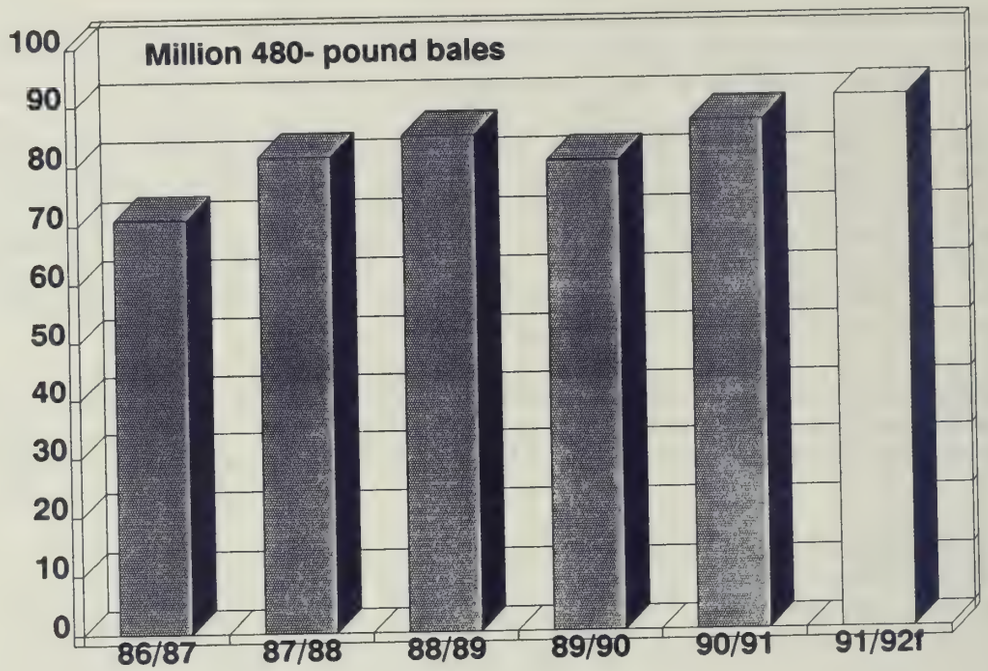

TABLE 18

WORLD COTTON AREA, YIELD, AND PRODUCTION			
Year	Harvested Area (1,000 Ha)	Yield (Kg/Ha)	Production (1,000 480-Bales)
1981/82	32,978	470	71,194
1982/83	31,393	474	68,283
1983/84	30,838	466	66,020
1984/85	33,853	572	89,003
1985/86	31,672	555	80,753
1986/87	29,495	523	70,814
1987/88	31,009	571	81,256
1988/89	33,701	547	84,663
1989/90	31,544	554	80,196
Estimate 1990/91	33,486	564	86,814
5-Year Avg.	31,484	550	79,536
Forecast 1991/92			91,000

CANADIAN GRAIN PROSPECTS

The 1991/92 Canadian grain crop is expected to return to more normal levels after last year's record wheat (31.8 million tons) and rye (0.9 million) output and above-average barley (13.5 million), corn (7.0 million), and oat (3.5 million) crops. Total production for the 1991/92 grain crops is forecast at 49.1 million tons, down 15 percent from the 1990/91 crop. A major income stabilization program authorized for the 1991/92 grain crop will have an impact on production decisions.

A two-part farm income stabilization program, the Gross Revenue Insurance Plan (GRIP) and the Net Income Stabilization Account (NISA) was announced for the 1991/92 grain crops and may be the most significant change to the Canadian domestic grain policy in a number of years. GRIP provides comprehensive revenue insurance, rather than separate price and yield insurance. NISA allows farmers to accumulate savings in good times and to tap these savings during difficult times. The Federal government, provincial governments, and individual producers make financial contributions into both programs. GRIP has been passed by the Prairie provinces, while only Saskatchewan has passed the NISA program.

The GRIP will allow participating farmers to insure their crops on the basis of gross revenue per acre. Farmer premiums, plus contributions from the Canadian government and participating provincial Governments will fund the program. GRIP allows participating farmers to guarantee minimum levels of "target revenues" for the eligible crops (wheat, barley, oats, canola, soybeans, rye, flaxseed, mustard seed, canary seed, mixed grain, and perennial crops). "Target revenue" is based on the 15-year "indexed moving average price" and historical yield, seeded area, and coverage level. The farmer is allowed to choose a coverage level between 70 and 90 percent of the support price.

Should market revenue (average market price X actual yield X seeded area) plus standard crop insurance payments for a crop fall below the indicated target revenue (on a per acre basis), GRIP will make up the difference. While the GRIP program will keep overall planting above levels that would have been expected based only on market prices, the relative target revenue levels between crops will likely be more important for determining farmer plantings of the various crops. GRIP coverage and farmer premiums will vary across the prairies. The variation in premium levels is a function of variation in average yields.

NISA is a special savings program for participating producers, with farmer contributions matched by the federal and provincial Governments. A farmer can set aside up to two percent of eligible sales in an individual account, up to a maximum of CAN$250,000. The program triggers payments when the farm's gross margin fall below a five-year average or the individual's net income falls below CAN$10,000.

GRAIN PRODUCTION PROSPECTS

Wheat: Production in 1991/92 is projected to be 26.1 million tons, 18 percent below last year. Area is expected to be virtually unchanged at 14.0 million hectares in 1991/92. Winter wheat plantings in the East are estimated to be down because fall seeded wheat on harvested soybean land was reduced due to wet weather. The lower area in the East will be offset by higher expected plantings of spring wheat in the prairies due to GRIP guarantees to participating producers. Production is expected to be below last year's record level winter wheat output in Ontario and record spring wheat yields in the prairie provinces. While recent rains have been very beneficial, low subsoil moisture means timely rains will be necessary. Durum area is estimated to remain constant, with average yields, production is likely to decline.

Barley: The 1991/92 production is projected at 11.8 million tons,down 13 percent from last year due to lower seeded area and assumed average yields. Excellent growing conditions last year caused barley yields to increase 13 percent above the 10-year average and 18 percent above the 1989/90 level. Preliminary evaluations of GRIP suggest that farmers will plant less barley as the spread between farmer premium payments and GRIP target revenue favors wheat and canola. The relative protection provided by GRIP is important because of expectations that the Canadian Wheat Board will lower initial barley prices for 1991.

Corn: Even though area is expected to increase, 1991/92 production is projected at 6.6 million tons, down 6 percent from 1990/91 as yields return to average. Corn area is estimated to expand 10 percent to 1.1 million hectares due to a large decrease in winter wheat area in Ontario. Winter wheat planting (which follow soybeans) was reduced because soybeans were harvested late. Corn is expected to be planted on much of the unplanted wheat area. Relative strength in corn prices, plus indications of an attractive GRIP program also are expected to provide incentives to plant corn.

Oats: The 1991/92 crop is projected at 3.0 million tons, down 14 percent from 1990/91, based on an average yield. Area is projected to decline 10 percent from last year to about the 1988/89 level. A second year of declining planted area is partially attributed to low prices and relatively high stocks. Although oat producers are eligible for GRIP, the program seems to favor wheat and canola producers, likely prompting lower planted area for oats.

Rye: Production for 1991/92 is projected at 600,000 tons, down 36 percent from last year because of a 35 percent reduction in area and average yields. Rye production reached a record level in 1990/91 as a result of favorable weather throughout most of the prairie provinces. Lower prices also caused the 1991/92 planted area to be reduced.

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TABLE 19

Canadian Grains

	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92 f
AREA HARVESTED (1,000 hectares)												
Barley	4,634	5,476	5,149	4,353	4,566	4,750	4,829	5,004	4,152	4,658	4,600	4,300
Corn	958	1,139	1,107	1,107	1,192	1,123	994	999	981	1,003	1,000	1,100
Oats	1,515	1,561	1,612	1,400	1,406	1,263	1,287	1,263	1,371	1,708	1,500	1,350
Rye	310	445	458	426	370	372	315	313	257	501	540	350
Wheat	11,098	12,427	12,554	13,697	13,158	13,729	14,239	13,473	12,987	13,627	14,100	14,000
TOTAL	*18,515*	*21,048*	*20,880*	*20,983*	*20,692*	*21,237*	*21,664*	*21,052*	*19,748*	*21,497*	*21,740*	*21,100*
YIELD (metric tons per hectare)												
Barley	2.43	2.51	2.71	2.35	2.25	2.61	3.03	2.79	2.46	2.50	2.93	2.73
Corn	6.01	5.86	5.88	5.36	5.69	6.21	5.95	7.02	5.47	6.36	7.00	6.00
Oats	2.00	2.04	2.26	1.98	1.83	2.17	2.53	2.37	2.18	2.08	2.33	2.22
Rye	1.45	2.08	2.04	1.93	1.76	1.53	1.93	1.58	1.04	1.74	1.74	1.71
Wheat	1.74	2.00	2.13	1.93	1.61	1.77	2.20	1.93	1.23	1.80	2.26	1.86
PRODUCTION (1,000 metric tons)												
Barley	11,259	13,724	13,966	10,209	10,279	12,387	14,634	13,957	10,212	11,666	13,500	11,750
Corn	5,753	6,673	6,513	5,931	6,778	6,970	5,912	7,015	5,369	6,379	7,000	6,600
Oats	3,028	3,188	3,637	2,773	2,576	2,736	3,251	2,995	2,993	3,546	3,500	3,000
Rye	448	927	933	823	652	569	609	493	267	873	940	600
Wheat	19,292	24,803	26,737	26,465	21,188	24,252	31,378	25,950	15,995	24,578	31,800	26,100
TOTAL	*39,780*	*49,315*	*51,786*	*46,201*	*41,473*	*46,914*	*55,784*	*50,410*	*34,836*	*47,042*	*56,740*	*48,050*

May 1991

Production Estimates & Crop Assessment Division, FAS, USDA

PRODUCTION OF RAISINS/SULTANAS

Production of raisins/sultanas in major producing countries for the 1990/91 season is forecast at 671,500 tons (packed weight basis), 8 percent below the 1989/90 volume. The decline primarily reflects smaller than anticipated packs in the Northern Hemisphere. Drought conditions reduced output in the United States and Greece by 11 and 52 percent, respectively. Sultana production in Turkey also has been revised downward due to heavy rains during the drying season.

Preliminary assessments indicate that the leading Southern Hemisphere raisin/sultana producers will generate a combined 1990/91 pack of 144,000 tons, 9 percent greater than the 1989/90 volume. Production in Australia is expected to expand by 35 percent--to 80,000 tons--due to higher grape yields and optimal growing and drying conditions. Argentina's 1990/91 pack is forecast at 8,000 tons, up 7 percent from a year ago, but significantly below the industry's production potential of 10,000 tons due to scattered frost and hail damage in Mendoza and San Juan Provinces. The quality of the pack reportedly ranges from good to excellent. Raisin production in Chile is expected to decline for the first time since the 1975/76 season. Drought conditions moderately reduced the fresh grape crop leaving fewer supplies available for drying. Consequently, Chile's 1990/91 raisin pack is forecast at only 27,000 tons, 11 percent below last season's record pack of 30,500 tons. Current indications are that South Africa's 1990/91 raisin/sultana pack will total only 29,000 tons, 15 percent below the near record volume produced a year ago. Untimely rains, high humidity, and minimal sunlight during the drying process not only reduced total output, but substantially compromised quality.

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PRODUCTION OF RAISINS/SULTANAS
(Metric Tons - Packed Weight Basis)

	1988/89	1989/90	1990/91 1/
NORTHERN HEMISPHERE			
Greece 2/	77,800	83,580	40,000
Mexico 3/	11,000	7,000	10,500
Turkey 2/	150,000	140,000	150,000
United States 2/	315,860	366,665	327,000
Total	554,660	597,245	527,500
SOUTHERN HEMISPHERE			
Argentina	7,000	7,500	8,000
Australia	60,012	59,463	80,000
Chile	24,500	30,500	27,000
South Africa	20,639	34,104	29,000
Total	112,151	131,567	144,000
WORLD TOTAL	666,811	728,812	671,500

1/ Preliminary.
2/ Revised May 1991.
3/ Forecast as of November 1990.

NOTE: Data for Afghanistan and Iran not available.

May 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 20

RAISINS/SULTANAS: PRODUCTION IN SELECTED COUNTRIES
(Metric Tons - Packed Weight Basis)

YEAR	ARGENTINA	AUSTRALIA	CHILE	GREECE	MEXICO	SOUTH AFRICA	TURKEY	UNITED STATES	TOTAL
1970/71	3,750	50,241	700	82,090	N/A	12,232	132,000	163,210	444,223
1971/72	2,600	99,925	720	87,407	N/A	12,614	100,000	164,375	467,641
1972/73	2,570	49,766	600	71,500	N/A	14,855	106,000	88,885	334,176
1973/74	3,300	53,282	650	57,800	N/A	5,351	85,000	185,355	390,738
1974/75	4,120	59,991	630	109,000	N/A	9,549	85,000	202,085	470,375
1975/76	6,000	68,862	1,100	87,000	N/A	6,503	110,000	231,595	511,060
1976/77	6,000	56,821	1,400	81,000	N/A	8,949	80,000	176,335	410,505
1977/78	4,000	65,022	1,500	61,500	N/A	12,881	110,000	205,480	460,383
1978/79	5,500	55,894	2,000	81,000	N/A	17,530	82,000	143,420	387,344
1979/80	5,000	92,162	2,000	78,700	N/A	25,397	83,000	244,960	531,219
1980/81	5,500	55,995	2,500	68,500	11,500	23,906	95,000	250,740	513,641
1981/82	6,000	88,885	2,500	98,100	13,000	24,775	110,000	216,500	559,760
1982/83	8,000	79,730	3,300	75,000	16,000	32,898	95,000	246,465	556,393
1983/84	7,000	81,740	4,000	103,000	9,120	29,839	100,000	328,980	663,679
1984/85	5,800	70,327	6,200	67,000	6,934	28,545	80,000	273,805	538,611
1985/86	5,500	93,736	9,000	90,000	20,000	37,685	120,000	284,715	660,636
1986/87	6,500	63,991	9,000	69,000	21,145	30,659	110,000	236,320	546,615
1987/88	6,600	74,029	16,500	40,000	11,250	27,448	110,000	303,950	589,777
1988/89	7,000	60,012	24,500	77,800	11,000	20,639	150,000	315,860	666,811
1989/90	7,500	59,463	30,500	83,580	7,000	34,104	140,000	366,665	728,812
1990/91 1/	8,000	80,000	27,000	40,000	10,500	29,000	150,000	327,000	671,500

1/ Preliminary.

NOTE: Data for Afghanistan and Iran not available.

MAY 1991

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

PRODUCTION OF DRIED PRUNES

Production of dried prunes in major producing countries during the 1990/91 season is forecast at 205,825 tons (packed weight basis), down 25 percent from a year ago. Despite a 65 percent production increase in France, significantly smaller output in Yugoslavia and the United States limited the Northern Hemisphere pack to only 180,025 tons. Preliminary assessments indicate that combined output in the Southern Hemisphere will total 25,800 tons, 8 percent below the record 1989/90 volume. Both Chile and South Africa are reporting smaller packs this season -- a normal downturn following record production levels last year. In Australia, hot, dry weather reduced production prospects for the second consecutive year. The 1990/91 pack is estimated at 2,800 tons, up 4 percent from a year ago, but well below the 3,000 tons generally considered a normal crop. Argentina's 1990/91 pack is expected to increase by 13 percent, to 9,000 tons. Quality and fruit size reportedly are excellent.

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PRODUCTION OF DRIED PRUNES
(Metric Tons - Packed Weight Basis)

	1988/89	1989/90	1990/91 1/
NORTHERN HEMISPHERE			
France 2/	41,494	19,949	33,000
Yugoslavia 2/	12,873	12,148	7,000
United States	143,835	215,275	140,025
Total	198,202	247,372	180,025
SOUTHERN HEMISPHERE			
Argentina	7,500	8,000	9,000
Australia	3,357	2,700	2,800
Chile	10,000	13,800	11,500
South Africa	2,901	3,512	2,500
Total	23,758	28,012	25,800
WORLD TOTAL	221,960	275,384	205,825

1/ Preliminary.
2/ Estimate as of November 1990.

MAY 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION

TABLE 21

DRIED PRUNES: PRODUCTION IN SELECTED COUNTRIES
(Metric Tons - Packed Weight Basis)

YEAR	ARGENTINA	AUSTRALIA	CHILE	FRANCE	SOUTH AFRICA	YUGOSLAVIA	UNITED STATES	TOTAL
1970/71	5,700	4,620	4,800	14,000	1,746	26,222	186,880	243,968
1971/72	3,500	2,873	4,200	16,000	1,836	16,720	122,405	167,534
1972/73	725	3,201	3,600	12,500	860	26,614	71,950	119,450
1973/74	5,000	2,724	4,100	21,000	1,620	7,592	191,550	233,586
1974/75	4,540	2,762	4,200	22,000	2,095	15,625	132,685	183,907
1975/76	10,000	3,240	4,400	470	1,816	21,150	139,225	180,301
1976/77	10,000	3,192	5,200	26,170	1,374	6,327	138,290	190,553
1977/78	9,500	2,307	5,200	6,133	2,081	22,896	148,570	196,687
1978/79	10,000	4,200	5,400	22,190	1,583	14,350	123,340	181,063
1979/80	9,000	2,400	4,500	24,308	1,675	10,798	127,080	179,761
1980/81	7,500	2,991	4,000	17,750	1,320	18,684	156,980	209,225
1981/82	9,000	1,042	3,800	28,660	1,514	18,802	149,040	211,858
1982/83	6,000	3,683	4,000	35,600	2,024	31,000	117,735	200,042
1983/84	6,500	2,703	4,500	25,184	2,085	29,107	135,490	205,569
1984/85	8,000	3,547	5,500	38,941	1,652	20,000	138,290	215,930
1985/86	9,000	3,813	9,300	25,742	2,351	18,700	134,310	203,216
1986/87	6,000	4,472	8,700	35,978	2,121	11,870	94,300	163,441
1987/88	11,000	1,749	11,000	30,380	2,752	12,387	218,135	287,403
1988/89	7,500	3,357	10,000	41,494	2,901	12,873	143,835	221,960
1989/90	8,000	2,700	13,800	19,949	3,512	12,148	215,275	275,384
1990/91 1/	9,000	2,800	11,500	33,000	2,500	7,000	140,025	205,825

1/ Preliminary.

MAY 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

SOVIET GRAIN ESTIMATES AND HISTORICAL RESULTS

The State Statistical Committee (GOSKOMSTAT) has published preliminary dry weight 1990/91 yield and/or production figures for wheat, corn, millet, rice, buckwheat, and total grains; however, complete official results for the 1990/91 grain harvest are still not available. The data and area figures released by GOSKOMSTAT in November 1990, were used to arrive at USDA's estimated 1990/91 production by type of grain. While the estimated total USSR grain crop is unchanged from earlier estimates, there were numerous changes in the individual grains.

Incorporating the preliminary Soviet yield results into the revised USDA estimates was complicated by the fact the GOSKOMSTAT yield and production figures were given on a net weight basis -- the weight of the grain after adjustment for moisture and trash. Traditionally, Soviet numbers have been expressed in terms of "bunker weight" -- the weight of the grain before cleaning and drying. The Soviets recently announced that grain yield and production data will now be reported exclusively on a net-weight basis. However, in order to maintain continuity with its historical data base, USDA will continue to report its Soviet grain estimates on a bunker-weight basis.

In the recently-released 1989 edition of Narodnoye Khozyaistvo (GOSKOMSTAT's yearbook of the national economy), net-weight yields were published for individual grain crops for the crop years 1986-1989. These figures, along with the historical bunker-weight yields, provided the base to estimate conversions from net weight to bunker weight for the USDA estimate of 1990/91 crop yields. These bunker-weight yield estimates were then combined with GOSKOMSTAT's published 1990/91 crop area to arrive at the estimated bunker weight production. The table below contains USDA's April and May estimates of area, yield, and production for the 1990/91 Soviet grain crop.

USSR Grains: 1990/91 Area, Yield, and Production

Crop	Area ---- MHa ----		Yield --- T/Ha ----		Production ---- MMT -----	
	April	May	April	May	April	May
Wheat	47.5	48.2	2.27	2.24	108.0	108.0
Barley	26.0	26.1	2.19	2.34	57.0	61.0
Rye	10.5	10.4	2.00	2.02	21.0	21.0
Oats	10.5	10.7	1.67	1.68	17.5	18.0
Corn	4.0	2.8	3.50	3.47	14.0	9.8
Millet	3.0	2.9	1.50	1.21	4.5	3.5
Coarse grains	54.0	52.9	2.11	2.14	114.0	113.3
Buckwheat	1.8	1.8	0.83	0.88	1.5	1.6
Rice	0.7	0.6	4.00	4.00	2.6	2.4
Pulses	5.8	5.7	1.47	1.61	8.5	9.2
Other	0.2	0.3	1.60	1.67	0.4	0.5
Total misc.	8.5	8.4	1.53	1.63	13.0	13.7
Total grains	110.0	109.5	2.14	2.15	235.0	235.0

During the transition period in the reporting of Soviet yield and production figures, comparisons between harvest results of previous years and results of 1990 and future years will be complicated. The following reference table, consisting of GOSKOMSTAT net-weight and bunker-weight yield and production figures for individual crops for the years 1986-1989 and USDA estimates of bunker and net results for the 1990 crop year, has been compiled to aid in making comparisons.

In addition to the release of the 1986-1989 crop yields, net-weight production figures for total grains going back to 1976 have been published by the Soviets. This indicates that long-term net-weight results are a matter of official record. The switch by USDA to use net-weight for reporting of production and use will depend on the availability of long-term historical net-weight harvest results, broken down by individual crop. Until such information is available, USDA estimates will continue to be expressed in bunker-weight terms; however, net-weight estimates will be provided when available as a reference for comparison.

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TABLE 22

Soviet Grains: Area, Yield, and Production 1986-1990

Bunker and Net Weight Comparison

		1986 BNKR	1986 NET	1987 BNKR	1987 NET	1988 BNKR	1988 NET	1989 BNKR	1989 NET	1990 BNKR	1990 NET	
WHEAT	Area (MHA)	48.7	48.7	46.7	46.7	48.1	48.1	47.7	47.7	48.2	48.2	*
	Yield (T/HA)	1.89	1.78	1.78	1.66	1.76	1.64	1.94	1.83	2.24	2.11	*
	Prod (MMT)	92.3	86.6	83.3	77.4	84.4	78.8	92.3	87.2	108.0	101.7	*
BARLEY	Area (MHA)	30.0	30.0	30.7	30.7	29.7	29.7	27.6	27.6	26.1	26.1	*
	Yield (T/HA)	1.80	1.65	1.91	1.74	1.50	1.37	1.75	1.63	2.34	2.15	
	Prod (MMT)	53.9	49.5	58.4	53.4	44.5	40.6	48.5	44.9	61.0	55.9	
RYE	Area (MHA)	8.7	8.7	9.7	9.7	10.1	10.1	10.7	10.7	10.4	10.4	*
	Yield (T/HA)	1.76	1.59	1.86	1.66	1.84	1.68	1.87	1.70	2.02	1.84	
	Prod (MMT)	15.2	13.8	18.1	16.1	18.5	16.9	20.1	18.3	21.0	19.1	
OATS	Area (MHA)	13.2	13.2	11.8	11.8	10.9	10.9	10.8	10.8	10.7	10.7	*
	Yield (T/HA)	1.66	1.43	1.57	1.35	1.40	1.21	1.57	1.39	1.68	1.49	
	Prod (MMT)	21.9	18.9	18.5	15.9	15.3	13.3	16.8	15.0	18.0	15.9	
CORN	Area (MHA)	4.2	4.2	4.6	4.6	4.4	4.4	4.1	4.1	2.8	2.8	*
	Yield (T/HA)	2.95	2.95	3.23	3.23	3.61	3.61	3.71	3.71	3.47	3.47	*
	Prod (MMT)	12.5	12.5	14.8	14.8	16.0	16.0	15.3	15.3	9.8	9.8	*
MILLET	Area (MHA)	2.5	2.5	2.8	2.8	2.6	2.6	2.8	2.8	2.9	2.9	*
	Yield (T/HA)	0.95	0.89	1.42	1.31	1.21	1.11	1.48	1.35	1.21	1.12	*
	Prod (MMT)	2.4	2.2	3.9	3.6	3.2	2.9	4.1	3.7	3.5	3.3	
COARSE GRAINS	Area (MHA)	58.6	58.6	59.6	59.6	57.7	57.7	56.0	56.0	52.9	52.9	
	Yield (T/HA)	1.81	1.65	1.91	1.74	1.69	1.55	1.87	1.74	2.14	1.97	
	Prod (MMT)	105.9	96.9	113.7	103.8	97.5	89.7	104.8	97.2	113.3	104.0	
BUCKWHEAT	Area (MHA)	1.6	1.6	1.6	1.6	1.7	1.7	1.7	1.7	1.8	1.8	*
	Yield (T/HA)	0.63	0.55	0.79	0.69	0.63	0.53	0.77	0.66	0.88	0.75	*
	Prod (MMT)	1.0	0.9	1.3	1.1	1.1	0.9	1.3	1.1	1.6	1.4	
RICE	Area (MHA)	0.6	0.6	0.7	0.7	0.7	0.7	0.7	0.7	0.6	0.6	*
	Yield (T/HA)	4.24	3.87	4.08	3.69	4.27	3.87	3.90	3.43	4.00	3.50	*
	Prod (MMT)	2.6	2.4	2.7	2.4	2.9	2.6	2.6	2.3	2.4	2.1	
PULSES	Area (MHA)	6.7	6.7	6.4	6.4	6.4	6.4	6.0	6.0	5.7	5.7	*
	Yield (T/HA)	1.17	1.04	1.55	1.37	1.38	1.23	1.61	1.46	1.61	1.46	
	Prod (MMT)	7.9	7.0	10.0	8.8	8.9	8.0	9.6	8.7	9.2	8.3	
OTHER MISC	Area (MHA)	0.3	0.3	0.3	0.3	0.2	0.2	0.2	0.2	0.3	0.3	
	Yield (T/HA)	1.33	0.67	1.33	1.00	1.50	1.00	1.50	1.00	1.67	1.60	
	Prod (MMT)	0.4	0.2	0.4	0.3	0.3	0.2	0.3	0.2	0.5	0.5	
TOTAL MISC	Area (MHA)	9.2	9.2	9.0	9.0	9.0	9.0	8.6	8.6	8.4	8.4	
	Yield (T/HA)	1.29	1.14	1.60	1.40	1.47	1.30	1.60	1.43	1.63	1.46	
	Prod (MMT)	11.9	10.5	14.4	12.6	13.2	11.7	13.8	12.3	13.7	12.3	
TOTAL GRAINS	Area (MHA)	116.5	116.5	115.2	115.2	114.9	114.9	112.3	112.3	109.5	109.5	
	Yield (T/HA)	1.80	1.66	1.83	1.68	1.70	1.57	1.88	1.75	2.15	1.99	
	Prod (MMT)	210.1	194.0	211.4	193.8	195.1	180.2	210.9	196.7	235.0	218.0	

*/ published GOSKOMSTAT figure.

BNKR = bunker weight (weight before cleaning and drying).
NET = net weight (weight after adjustment for moisture and trash).

May 1991 Production Estimates & Crop Assessment Division, FAS, USDA

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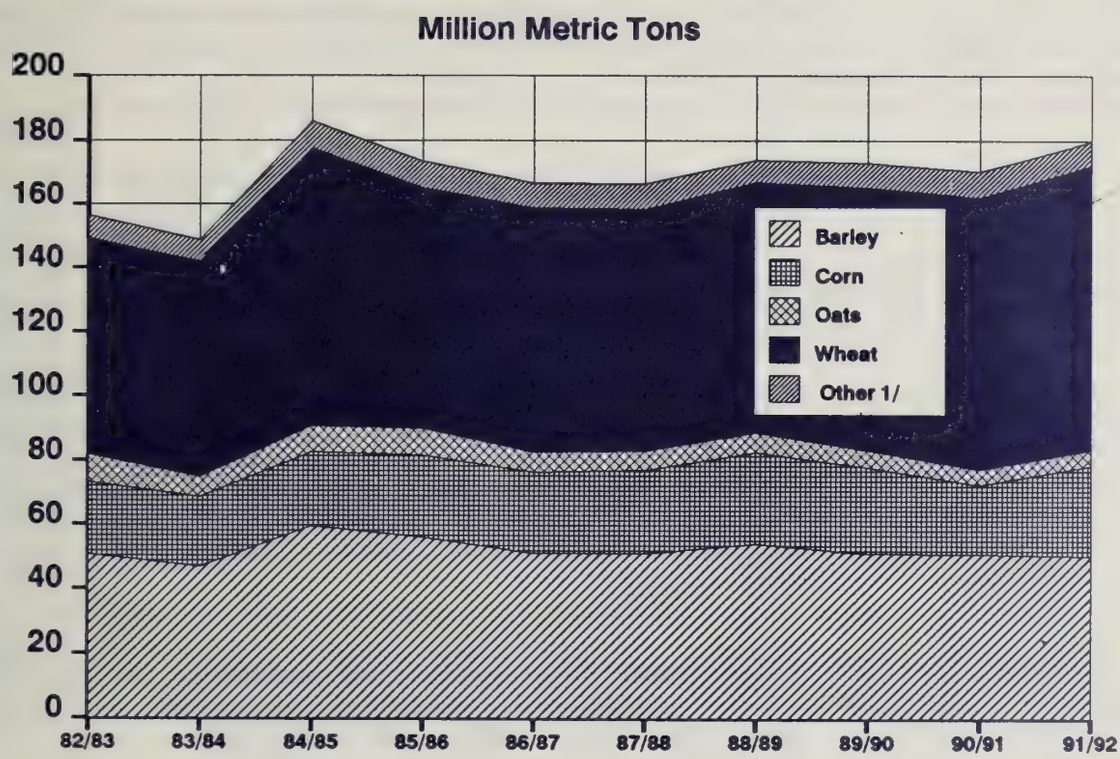

1/Other includes rye, sorghum, mixed grains, and milled rice.

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- Israeli Oilseeds

Approved by the World Agricultural Outlook Board - USDA

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-256), July 11, 1991.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 382-8888 or by FAX (202) 447-7729.

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CONVERSION TABLE

Metric Tons to Bushels		Metric Tons to 480-lb. Bales	
		Cotton	= MT*4.592917
Wheat & Soybeans	= MT*36.7437		
Corn, Sorghum, Rye	= MT*39.36825		
Barley	= MT*45.929625		
Oats	= MT*68.894438	Metric Tons to Hundredweight	
1 hectare	= 2.471044 acres	Rice	=MT*22.04622
1 kilogram	= 2.204622 pounds		

NOTE: BEGINNING WITH THE MAY EDITION, THIS CIRCULAR SERIES COMBINES DATA FOR THE TERRITORIES FORMERLY KNOWN AS EAST GERMANY (GDR) AND WEST GERMANY (FRG) UNDER THE HEADING GERMANY. LIKEWISE, DATA FOR THE TERRITORY FORMERLY CALLED EAST GERMANY (GDR) ARE INCLUDED IN AGGREGATES FOR THE EUROPEAN COMMUNITY (EC-12) AND EXCLUDED FROM AGGREGATES FOR EASTERN EUROPE. BECAUSE OF THIS, DATA FOR "GERMANY", EASTERN EUROPE, AND THE EUROPEAN COMMUNITY (EC-12) ARE NOT COMPARABLE WITH DATA PUBLISHED IN PRIOR EDITIONS OF THIS CIRCULAR SERIES AND MAY NOT BE COMPARABLE WITH SUCH ESTIMATES FOUND IN OTHER PUBLICATIONS OF THE U.S. DEPARTMENT OF AGRICULTURE.

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PRODUCTION HIGHLIGHTS FOR 1991/92

July 1991

WHEAT: World production for 1991/92 is estimated at 556.1 million tons, up 3.3 million or 1 percent from last month, but down 6 percent from last year. Country highlights are as follows:

- **United States** — Production is estimated at 55.3 million tons, up 0.2 million from last month, but down 26 percent from last year. The increase is due to higher estimated spring wheat area and yield.

- **Canada** — Production is estimated at 29.0 million tons, up 2.9 million or 11 percent from last month, but down 9 percent from last year. Continued favorable weather resulted in higher estimated yield.

- **Eastern Europe** — Production is estimated at 39.0 million tons, up 1.0 million or 3 percent from last month, but down 5 percent from last season. The decline is due to reduced area and yields in Romania.

- **EC-12** — Production is estimated at 88.8 million tons, up 0.9 million or 1 percent from last month and up 5 percent from 1990/91. Favorable weather increased yield prospects in Germany, Italy, and Greece while continued warmer and drier-than-normal weather adversely affected the crop in Spain.

- **Turkey** — Production is estimated at 16.0 million tons, up 0.5 million or 3 percent from last month's estimate and up 7 percent from last year. The increase is due to cooler-than-normal temperatures and above normal rainfall throughout the producing areas.

- **Morocco** — Production is estimated at 4.6 million tons, up 0.5 million or 13 percent from last month and up 28 percent from 1990/91. Although planted area for both durum and soft wheat is slightly lower than last year, yield prospects have improved by 30 percent.

- **Saudi Arabia** — Production is estimated at 4.0 million tons, up 0.3 million or 7 percent from last month and 11 percent from last year. High guaranteed prices and prompt payment by the government enabled producers to purchase the required inputs.

- **Soviet Union** — Production is estimated at 92.0 million tons, down 2.0 million or 2 percent from last month and down 15 percent from last year. The decrease from last month is due to reduced yield estimates in the spring grains area.

- **Pakistan** — Production is estimated at 14.5 million tons, down 0.5 million or 3 percent from last month, but up 1 percent from last year's harvest. Wheat yields were reduced in Punjab Province due to widespread rains during the final grain filling stage and at early harvest. Wheat area remained unchanged at a record 7.96 million hectares.

- **South Africa** — Production is estimated at 2.0 million tons, down 0.4 million or 17 percent from last month, but up 18 percent from last year. Late rains in the Cape and Free State reduced both area and yield prospects.

COARSE GRAINS: World production for 1991/92 is estimated at 828.0 million tons, up 1.9 million or less than 1 percent month and up less than 1 percent from last year. Country highlights are as follows:

- **United States** — Production is estimated at 240.9 million tons, up 0.6 million, a slight increase from last month and up 4 percent from last year. The increase is due to higher barley production which is only partially offset by a decrease in oat production.

- **Canada** — Production is estimated at 24.4 million tons, up 1.5 million or 6 percent from last month, but down 6 percent from last year. An increase in barley area and yield offset a decline in oats.

- **Eastern Europe** — Production is estimated at 58.0 million tons, up 1.2 million or 2 percent from last month and up 11 percent from last year's drought-reduced harvest. Increased production in Romania resulted from favorable weather, altered labor patterns, and producer incentives.

- **EC-12** — Production is estimated at 89.5 million tons, up 0.7 million or 1 percent from last month and up 7 percent from last year. An increase in barley production in France and Germany is expected to offset a decrease in prospective barley output in Spain. With the exception of the Iberian Peninsula, favorable weather increased yield prospects.

- **Morocco** — Production is estimated at 2.8 million tons, up 0.6 million or 24 percent from last month and up 30 percent from last year. Abundant rainfall since mid-February has improved yield prospects for barley.

- **Zambia** — Production is estimated at 1.3 million tons, up 0.5 million or 53 percent from last month and 44 percent above last year's drought reduced crop. Beneficial late season rains increased yields.

- **Turkey** — Production is estimated at 9.7 million tons, up 0.3 million or 3 percent from last month's estimate and up 9 percent from last year's harvest. The increase is based on favorable weather which improved barley production prospects.

- **Soviet Union** — Production is estimated at 99.5 million tons, down 3.0 million or 3 percent from last month and down 12 percent from last year. The decrease is due to yield reductions for barley and oats.

RICE (MILLED-BASIS): World production for 1991/92 is projected at 344.2 million tons, down 3.8 million or 1 percent from last year's record crop. Foreign production in 1991/92 is projected at 339.2 million tons, a decrease of 3.7 million or 1 percent from 1990/91. Country highlights are as follows:

- **United States** — Production is estimated at 5.0 million tons, down 0.1 million or 3 percent from last year's level.

- **China** — Production is estimated at 126.0 million tons, down 3.5 million or 3 percent from last year's record crop. Rice area is expected to decrease by 500,000 hectares as farmers shift to other crops because of unusually large stocks and declining prices. Yields are forecast slightly lower in 1991 due to reports of severe weather in parts of China's rice production area.

- **India** — Production is estimated at 73.0 million tons, down 2.0 million or 3 percent from last year's record harvest. Rice area is forecast to decline less than 1 percent, while yields are estimated slightly below last year's record level. Three consecutive bumper grain harvests are expected to limit the growth of crop returns to rice farmers.

- **Vietnam** — Production is estimated at 11.4 million tons, down 0.3 million or 3 percent from 1990/91. Inadequate supplies of fertilizer and reduced area account for the decline.

- **Nepal** — Production is estimated at 2.0 million tons, down 0.3 million or 13 percent from 1990/91's record harvest. Normal rainfall during the monsoon growing season is expected to cause crop yields to return to near average levels.

- **Indonesia** — Production is estimated at 29.0 million tons, down 0.2 million or 1 percent from 1990/91. After two successive record crops, delays in planting caused by the late onset of rains plus delays in harvesting due to excessively wet conditions caused a reduction in yields.

- **Thailand** — Production is estimated at 13.2 million tons, up 1.8 million or 16 percent from 1990/91. An increase in area and return to normal yields will boost production. To date there have been no reports of significant brown plant hopper damage that hurt last year's main season crop.

- **Brazil** — Production is estimated at 6.8 million tons, up 0.5 million or 8 percent from 1990/91. The production increase is due to a return to near average area and continued favorable yield prospects.

- **Egypt** — Production is estimated at 2.1 million tons, up 0.3 million or 17 percent from last year. Adequate irrigation supplies coupled with production and marketing reforms resulted in record production during the 1990/91 crop season. Rice yields and area planted are expected to continue their upward trend.

- **Bangladesh** — Production is estimated at a record 18.0 million tons, up 0.2 million or 1 percent from 1990/91's cyclone affected harvest. Rice area is forecast to remain unchanged from last year, while yields are forecast to improve slightly barring any major flood or cyclonic damage.

- **Pakistan** — Production is estimated at 3.2 million tons, up 0.1 million or 2 percent from last year. Crop area is estimated up 1 percent, with rice yields forecast at average levels. Rice area and yields have shown little variation over the last 15 years, with the 1991/92 growing season following the same trend.

OILSEEDS: Total world oilseeds production during 1991/92 is forecast at a record 223.8 million tons, up 6.0 million or 3 percent from 1990/91. Foreign production is forecast to be a record 160.5 million tons, up 3.3 million or 2 percent from last year. U.S. total oilseed production is forecast at 63.2 million tons, up 2.8 million or 4 percent from last year.

* **Soybeans:** World production for 1991/92 is forecast at 107.0 million tons, up 3.4 million or 3 percent from last year. Total foreign soybean output is forecast at 53.4 million tons, up 2.1 million or 4 percent from 1990/91. Country highlights are as follows:

  - **United States** — Production is estimated at 53.6 million tons, up 1.3 million or 3 percent above last year. The increase is due to higher estimated area.

  - **EC-12** — Production is estimated at 1.8 million tons, down 0.4 million or 16 percent from 1990/91. Reduced area in Italy, the EC's major producer, accounts for the decline.

  - **Paraguay** — Production is estimated at 1.6 million tons, up 0.3 million or 23 percent from 1990/91. The increase is attributed to higher yields than last year's drought affected crop.

  - **Brazil** — Production is forecast at 17.5 million tons, up 2.0 million or 13 percent from last year. The increase in production is due to expectations for a partial recovery in planted area and a return to near normal yields.

  - **Argentina** — Production is estimated at 10.8 million tons, down 0.2 million or 2 percent from the record production and near-record yields in 1990/91. The decrease is based on anticipated average yield.

  - **China** — Production is estimated at 11.5 million tons, up 0.1 million or 1 percent from last year. Harvested soybean area is expected to increase in 1991.

  - **India** — Production is estimated at 2.4 million tons, unchanged from last year's record harvest. Soybean area is forecast to rise 4 percent, continuing the expansion of this non-traditional oilseed in central India, but will be offset by a lower yield.

* **Cottonseed:** World production for 1991/92 is forecast at 35.0 million tons, up 1.6 million or 5 percent from last year. Total foreign production is forecast at 29.3 million tons, up 1.2 million or 4 percent from last year. Country highlights are as follows:

- **United States** — Cottonseed production is estimated at 5.8 million tons, up 0.3 million or 6 percent from 1990/91. The estimate is based on increased area for harvest.

- **China** — Production is estimated at 8.5 million tons, up 0.8 million or 11 percent from last year. Cotton area is expected to increase as farmers shift from grain to cotton production because of higher relative prices.

- **India** — Production is estimated at 4.2 million tons, up 0.2 million or 5 percent from last year. Harvested area is forecast to rise by 3 percent owing to relatively high cotton lint prices, strong domestic cotton demand, and continuing favorable returns to growers.

- **Brazil** — Production is forecast at 1.4 million tons, up 0.1 million or 8 percent from last year. The production increase is due to improved yield prospects. The 1990/91 cotton crop was negatively impacted by dry weather during the growing season.

- **Egypt** — Production is projected at 0.6 million tons, down 0.1 million or 10 percent from last year. Cottonseed production is expected to continue its decline, reducing the 1991/92 crop to near record low levels.

- **Pakistan** — Production is estimated at a record 3.4 million tons, up 0.1 million or 3 percent from last year. Harvested area is forecast at a record, owing to strong price incentives relative to competitor crops.

- **Turkey** — Production is estimated at 0.8 million tons, down 0.1 million or 14 percent from last year. The decrease is due to reduced area.

* **Peanuts:** World production for 1991/92 is forecast at 22.5 million tons, up 0.4 million or 2 percent from 1990/91. Total foreign production is forecast at 20.4 million tons, down 0.1 million or 1 percent from last year. Country highlights are as follows:

  - **United States** — Production is estimated at 2.1 million tons, up 0.5 million or 31 percent from last year. Yield is expected to recover from last year's level and area is estimated up 9 percent from 1990/91.

  - **China** — Production is estimated at 5.8 million tons, down 0.6 million or 9 percent from last year's unusually large crop. An increase in area is expected to be offset by a return to average yield.

  - **India** — Production is estimated at 7.6 million tons, up 0.3 million or 4 percent from last year's drought-affected crop. Peanut area is forecast to rise 2 percent owing to strong price incentives. Peanut yields are expected to rebound to near average levels.

* **Sunflowerseed:** World production for 1991/92 is forecast at 21.6 million tons, down 0.4 million or 2 percent from 1990/91. Total foreign production is forecast at 20.1 million tons, down 0.9 million or 4 percent from last year. Country highlights are as follows:

  - **United States** — Production is estimated at 1.5 million tons, up 0.5 million or 47 percent from last year. In addition to an improved outlook for average yield over last season, harvested area is expected to be up 37 percent from 1991/92.

  - **Argentina** — Production is estimated at 3.5 million tons, down 0.4 million or 10 percent from near-record production and record yields in 1990/91. An increased area is expected to be offset by lower yields.

  - **EC-12** — Production is estimated at 3.8 million tons, down 0.3 million or 8 percent from 1990/91. Reduced area, primarily in Spain and France, accounts for the decline.

  - **Soviet Union** — Production is estimated at 6.8 million tons, up 0.2 million or 4 percent from last year. A small increase in harvested area is expected to be bolstered by a marginal improvement in average yield from 1990/91.

- **Turkey** — Production is estimated at 0.7 million tons, down 0.2 million or 24 percent from last year. Reduced plantings after rains in June dampened prospects for the 1991/92 crop.

* **Rapeseed:** World production for 1991/92 is forecast at a record 27.1 million tons, up 1.3 million or 5 percent from last year. Country highlights are as follows:

  - **Canada** — Production is estimated at 4.2 million tons, up 0.9 million or 26 percent from 1990/91. An increase in area and good yield potential is expected to result in Canada's second largest rapeseed crop.

  - **EC-12** — Production is estimated at 7.1 million tons, up 0.9 million or 14 percent from last year. German farmers have planted more rapeseed in response to improved crop security, rising average yields, and higher profitability. Favorable weather throughout most of the EC rapeseed area has improved yield prospects.

  - **India** — Production is estimated at 5.0 million tons, down 0.7 million or 13 percent from last year's record harvest. Rapeseed area is forecast to expand by 2 percent in 1991/92, while crop yield is expected to return to near average levels.

  - **China** — Production is estimated at a record 7.1 million tons, up 0.1 million or 2 percent from last year. Farmers responded to higher prices by expanding area and, with favorable weather during the growing season, yields are forecast to increase.

  - **Eastern Europe** — Production is estimated at 1.7 million tons, down 0.1 million or 4 percent from last year. Harvested area is forecast to decrease 8 percent from last year, while yields are estimated to decrease by 4.2 percent.

* **Flaxseed:** World production for 1991/92 is forecast at 2.1 million tons, down 0.2 million or 10 percent from last year. While production in the United States is small, this year's output is expected to increase by 18 percent over last year, to 114,000 tons. Total foreign production is pegged at 2.0 million tons, down 0.3 million or 11 percent from last year. Country highlights are as follows:

  - **Canada** — Production is estimated at 0.6 million tons, down 0.3 million or 33 percent from last year. A drop in area, partly as a result of large carry-over stocks, and an expected reduction in yield account for the decline.

- o **EC-12** — Production is estimated at 168,000 tons, up 53,000 or 46 percent from last year. Stimulated by high EC area subsidies, production in the United Kingdom is expected to double.

* **Copra:** World production for 1991/92 is forecast at 4.8 million tons, down 165,000 or 3 percent from last year. Copra production reached a record 5.3 million tons in 1985/86. Country highlights are as follows:

  - o **Philippines** — Production is estimated at 2.0 million tons, down 0.2 million or 10 percent from 1990/91. After two years of increasing output, coconut trees are expected to undergo a cyclical downturn in fruit production.

* **Palm Kernels:** World production for 1991/92 is forecast at a record 3.6 million tons, up 7 percent from last year. Country highlights are as follows:

  - o **Malaysia** — Production is estimated at 2.0 million tons, up 0.2 million or 9 percent from last year. The increase is attributed to an expected rise in oil palm output.

* **Palm Oil:** World production for 1991/92 is forecast at a record 11.9 million tons, up 0.8 million or 7 percent from last year. Country highlights are as follows:

  - o **Malaysia** — Production is estimated at 6.6 million tons, up 0.5 million or 8 percent from 1990/91. Yields are expected to rebound from last year's decline.

  - o **Indonesia** — Production is estimated at 2.7 million tons, up 0.2 million or 8 percent from 1990/91. Increased area, good weather, and maturing trees are expected to boost output.

COTTON: World cotton production in 1991/92 is projected at a record 90.3 million bales. The estimate is down 0.4 million bales or 1 percent from last month but up 3.7 million bales or 4 percent from 1990/91 and 2 percent above the previous record of 89 million bales harvested in 1984/85. Total foreign production is projected at 74.1 million bales, down 0.6 million or 1 percent from last month, but represents a gain of 4 percent over 1990/91 and second only to the 1984/85 record crop of 76 million bales. Country highlights are as follows:

- o **United States** — Production is estimated at 16.2 million bales, up 0.2 million or 1 percent from last month and up 5 percent from last year. This would be the largest crop since 1953/54 when output hit 16.4 million bales. Due to late planting and/or replanting, cotton development is behind normal and last year, but conditions are improving.

- **China** — Production is estimated at 22.5 million bales, up 1.8 million or 9 percent from last year. Cotton area is expected to increase by 9 percent to 6.1 million hectares in response to relatively high cotton prices and generous government production incentives. Weather for the 1991 crop has been generally favorable in northern production areas, but heavy rain and flooding during June may have damaged the crop between the Huai and Yangtze River valleys.

- **India** — Production is estimated at 10.0 million bales, up 0.8 million or 9 percent from last year's disappointing crop. Cotton yields are forecast to rebound to near average levels this year. Cotton area is forecast to increase 3 percent due to high domestic prices, expectation of increased government support prices, and high domestic and export demand.

- **Brazil** — Production is projected at 3.5 million bales, up 0.4 million or 13 percent from last year. The 1991/92 crop yields are forecast to recover from last year's weather-reduced levels. Area is expected to remain virtually unchanged.

- **Pakistan** — Production is estimated at a record 7.8 million bales, up 0.3 million or 4 percent from last year's record harvest. Cotton area and yields are forecast above 1990/91 levels, as strong domestic demand is expected to influence growers to expand production and use higher levels of crop inputs.

- **Mexico** — Production is forecast to increase to 1.0 million bales, up 0.2 million bales or 28 percent above last year's weather-damaged crop. Area is estimated up 40 percent with the largest increase in non-irrigated areas. Strong international prices have led to increased area.

- **USSR** — Production is estimated at 11.5 million bales, down 0.5 million or 4 percent from last year. Area is forecast down 3 percent as land was shifted into feed and produce production. The growing season is generally favorable with adequate irrigation water and normal temperatures.

- **Turkey** — Production is estimated at 2.5 million bales, down 0.3 million or 11 percent from last year's production. Harvested area is forecast to decrease to 0.6 million hectares. Yields are expected to decrease. Factors contributing to the expected lower yields include rains in early June that reduced and/or delayed planting.

- **Egypt** — Production is forecast at 1.3 million bales, down 0.1 million or 6 percent from last year. The outlook for the 1991/92 cotton crop is uncertain. Planted acreage is projected to decrease moderately as producers respond to a new government policy aimed at removing marginal land from cotton.

- **Australia** — Production is estimated at 1.7 million bales, down 0.1 million or 3 percent from last year's record crop. Cotton area is forecast to rise 4 percent, owing to cotton's favorable price situation in regards to competitor crops. However, yields are forecast down as dryland area should expand over 1990/91 levels.

- **Argentina** — Production is estimated at 1.3 million bales, down slightly from last year. Area is forecast to decrease 6 percent due to a shortage of credits and poor returns from last year's crop. Yields are expected near average.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	1991/92	1989/90	1990/91	June	July	1989/90	1990/91	June	July
	--Million Acres--			--Million Acres--			--Bushels per Acre--				--Million Bushels--			
All Wheat	76.6	77.3	70.0	62.2	69.4	58.1	32.7	39.5		35.0	2,037	2,739	2,024	2,032
Winter	55.1	57.0	51.0	41.5	50.0	39.5	35.0	40.7	36.0	34.4	1,455	2,033	1,449	1,361
Other	21.5	20.3	19.0	20.7	19.4	18.6	28.1	36.4		23.9	582	705	575	671
Rye	2.0	1.6	1.7	0.5	0.4	0.4	28.2	27.1		27.6	14	10	12	12
Soybeans	60.8	57.8		59.5	56.5		32.3	34.0			1,924	1,922	1,875	1,970
Corn	72.2	74.2		64.7	67.0		116.3	118.5			7,525	7,933	8,275	8,275
Sorghum	12.6	10.5		11.1	9.1		55.4	62.9			615	571	640	630
Barley	9.1	8.2	8.9	8.3	7.5	8.4	48.6	55.9		56.5	404	419	425	476
Oats	12.1	10.4	8.6	6.9	5.9	5.0	54.3	60.1		56.3	374	357	300	280
							--Pounds per Acre--				--Million CWT--			
Rice	2.7	2.9		2.7	2.8		5,749	5,507			154.5	154.9	154.0	157.5
											--Million 480-Pound--			
All Cotton	10.6	12.4		9.5	11.7		614	634			12.2	15.5	16.0	16.2

1/Estimates from USDA National Agricultural Statistics Service (NASS) for 1989/90, 1990/91 and wheat, barley, and oats forecast for 1991/92.
All other 1991/92 projections are from USDA Interagency Commodity Estimates Committees.

TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			USSR	Asia					South America		Selected Other			All Other Countries
			United States	Canada	Mexico	EC-12	Oth. W. Europe	Eastern Europe		China	India	Indo-nesia	Paki-stan	Thai-land	Argen-tina	Brazil	Aus-tralia	South Africa	Turkey	
	—Million Metric Tons—																			
Wheat																				
1989/90	537.6	482.2	55.4	24.6	4.0	82.0	4.4	40.7	92.3	90.8	54.1	0.0	14.4	0.0	10.2	5.6	14.2	2.0	12.5	15.4
1990/91 prel.	593.5	518.9	74.5	31.8	3.9	84.8	5.1	41.1	108.0	98.0	49.7	0.0	14.3	0.0	11.0	3.1	15.4	1.7	15.0	18.1
1991/92 proj.																				
June	552.8	497.7	55.1	26.1	3.5	88.0	4.1	38.0	94.0	95.0	54.0	0.0	15.0	0.0	10.0	4.0	12.0	2.4	15.5	17.3
July	556.1	500.8	55.3	29.0	3.5	88.8	4.1	39.0	92.0	95.0	54.0	0.0	14.5	0.0	10.0	4.0	12.0	2.0	16.0	17.6
Coarse Grains																				
1989/90	799.5	578.1	221.4	23.5	14.1	89.6	12.4	60.2	104.8	93.5	34.6	5.0	2.7	4.3	8.3	22.5	6.8	9.5	7.5	78.8
1990/91 prel.	825.2	594.6	230.6	26.0	17.3	83.9	13.6	52.3	113.3	106.0	35.0	5.3	2.9	4.0	11.2	24.2	6.9	7.6	8.9	76.4
1991/92 proj.																				
June	826.1	585.8	240.4	23.0	16.0	88.8	12.2	56.8	102.5	99.4	33.0	5.6	2.4	4.1	10.1	26.7	7.4	8.6	9.4	79.8
July	828.0	587.1	240.9	24.4	16.0	89.5	12.2	58.0	99.5	99.4	33.0	5.6	2.4	4.1	10.1	26.7	7.4	8.6	9.7	80.5
Rice (Milled)																				
1989/90	344.0	338.9	5.1	0.0	0.4	1.4	0.0	0.1	1.7	126.1	74.1	29.1	3.2	13.3	0.2	4.9	0.7	0.0	0.2	23.1
1990/91	348.1	343.0	5.1	0.0	0.2	1.6	0.0	0.1	1.6	129.5	75.0	29.2	3.1	11.4	0.2	6.3	0.5	0.0	0.2	23.7
1991/92 proj.																				
June	345.9	341.0	4.9																	
July	344.2	339.2	5.0	0.0	0.3	1.5	0.0	0.1	1.7	126.0	73.0	29.0	3.2	13.2	0.2	6.8	0.6	0.0	0.2	23.4
Total Grains 1/																				
1989/90	1,681.1	1,399.2	281.9	48.0	18.5	173.0	16.8	101.0	198.8	310.4	162.7	34.1	20.4	17.6	18.7	33.0	21.7	11.5	20.2	192.9
1990/91 prel.	1,766.7	1,456.5	310.2	57.8	21.4	170.3	18.7	93.5	222.9	333.5	159.6	34.5	20.3	15.4	22.5	33.6	22.9	9.3	24.1	196.3
1991/92 proj.																				
June	1,724.8	1,424.5	300.4																	
July	1,728.4	1,427.2	301.2	53.4	19.8	179.8	16.3	97.2	193.2	320.4	160.0	34.6	20.1	17.3	20.3	37.5	20.0	10.6	25.9	200.8
Oilseeds 2/																				
1989/90	214.0	154.7	59.3	4.9	1.4	11.5	0.7	5.2	13.8	28.5	19.3	2.2	3.3	0.9	15.8	21.8	0.7	1.0	2.3	21.5
1990/91 prel.	217.7	157.2	60.5	5.7	1.0	13.0	0.7	4.3	13.0	33.6	20.4	2.2	3.6	0.7	16.3	17.0	2.0	1.0	1.9	20.5
1991/92 proj.																				
June	223.0	162.5	60.5																	
July	223.8	160.5	63.2	6.3	1.1	13.2	0.7	4.2	13.4	34.1	20.2	2.3	3.8	0.7	15.6	19.1	1.0	1.0	1.6	22.3
	—Million 480-Pound Bales—																			
Cotton																				
1989/90	80.0	67.8	12.2	0.0	0.8	1.5	0.0	0.1	12.3	17.4	10.6	0.0	6.7	0.1	1.3	3.0	1.4	0.3	2.8	9.5
1990/91 prel.	86.6	71.1	15.5	0.0	0.8	1.4	0.0	0.1	12.0	20.7	9.2	0.0	7.5	0.1	1.3	3.1	1.8	0.2	2.9	10.1
1991/92 proj.																				
June	90.7	74.7	16.0																	
July	90.3	74.1	16.2	0.0	1.0	1.3	0.0	0.1	11.5	22.5	10.0	0.0	7.8	0.2	1.3	3.5	1.7	0.3	2.5	10.4

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains and pulses are 210.9 million tons in 1989/90, 235.0 million in 1990/91, and 205.0 million forecast in 1991/92.
2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also include copra and palm kernels for all countries.
Note: Entries of 0.0 indicate no reported or insignificant production.

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TABLE 3

Wheat Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. June	1991/92 Proj. July	1989/90	Prel. 1990/91	1991/92 Proj. June	1991/92 Proj. July
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	225.5	231.1	224.4	2.38	2.57		2.48	537.6	593.5	552.8	556.1
United States	25.2	28.1	23.5	2.20	2.66		2.35	55.4	74.5	55.1	55.3
Total Foreign	200.3	203.0	200.8	2.41	2.56	2.48	2.49	482.2	518.9	497.7	500.8
Maj. Foreign Exporters	45.1	45.6	44.4	2.91	3.14	3.07	3.15	131.0	143.0	136.1	139.8
Argentina	5.5	5.9	5.3	1.86	1.86	1.89	1.89	10.2	11.0	10.0	10.0
Australia	9.0	9.2	8.0	1.58	1.67	1.50	1.50	14.2	15.4	12.0	12.0
Canada	13.6	14.0	14.1	1.80	2.27	1.86	2.06	24.6	31.8	26.1	29.0
EC-12	17.0	16.5	17.0	4.83	5.15	5.19	5.23	82.0	84.8	88.0	88.8
Major Importers	96.4	97.6	95.8	2.48	2.68	2.54	2.53	238.8	261.1	243.5	243.0
Brazil	3.4	2.7	2.6	1.65	1.16	1.54	1.54	5.6	3.1	4.0	4.0
China	29.8	30.8	30.8	3.04	3.18	3.11	3.08	90.8	98.0	95.0	95.0
Eastern Europe	9.8	9.8	9.8	4.14	4.18	3.86	4.00	40.7	41.1	38.0	39.0
Egypt	0.6	0.7	0.8	5.05	5.79	6.40	6.40	3.2	4.3	4.8	4.8
Other N. Africa 1/	4.7	5.1	5.2	1.13	1.11	1.28	1.40	5.3	5.6	6.8	7.3
Japan	0.3	0.3	0.2	3.47	3.66	3.46	3.51	1.0	1.0	0.9	0.9
USSR	47.7	48.2	46.5	1.94	2.24	2.02	1.98	92.3	108.0	94.0	92.0
Other Foreign	58.9	59.8	60.6	1.91	1.92	1.95	1.95	112.4	114.8	118.2	118.0
India	24.1	23.5	24.3	2.24	2.12	2.22	2.22	54.1	49.7	54.0	54.0
Iran	6.0	6.2	6.2	0.92	1.13	1.03	1.03	5.5	7.0	6.4	6.4
Mexico	1.0	1.0	0.9	4.21	4.11	3.98	3.98	4.0	3.9	3.5	3.5
Non-EC W. Europe	0.8	0.9	0.8	5.19	5.48	5.01	5.01	4.4	5.1	4.1	4.1
Pakistan	7.7	7.8	8.0	1.87	1.82	1.89	1.82	14.4	14.3	15.0	14.5
South Africa	1.8	1.7	1.9	1.11	1.00	1.26	1.08	2.0	1.7	2.4	2.0
Turkey	8.7	8.8	8.9	1.44	1.71	1.76	1.80	12.5	15.0	15.5	16.0
Others	8.7	10.0	9.7	1.76	1.81	1.78	1.81	15.4	18.1	17.3	17.6

1/ Algeria, Libya, Morocco, and Tunisia.

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TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	June	July	1989/90	1990/91	June	July
TOTAL COARSE GRAINS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World 1/	321.0	318.8		2.49	2.59			799.5	825.2	826.1	828.0
United States	37.0	36.4		5.98	6.34			221.4	230.6	240.4	240.9
Total Foreign	284.0	282.4	283.3	2.04	2.11	2.07	2.07	578.1	594.6	585.8	587.1
Maj. Foreign Exporters	21.3	20.9	21.7	2.46	2.66	2.47	2.51	52.5	55.7	53.1	54.5
Argentina	3.2	3.3	3.5	2.64	3.43	2.88	2.88	8.3	11.2	10.1	10.1
Australia	4.0	4.3	4.8	1.73	1.63	1.53	1.53	6.8	6.9	7.4	7.4
Canada	8.3	8.0	7.7	2.84	3.24	3.07	3.16	23.5	26.0	23.0	24.4
South Africa	4.4	3.8	4.2	2.18	1.97	2.07	2.07	9.5	7.6	8.6	8.6
Thailand	1.6	1.5	1.5	2.78	2.58	2.72	2.72	4.3	4.0	4.1	4.1
Major Importers	103.7	99.7	101.1	2.73	2.83	2.74	2.74	282.7	281.8	277.9	276.8
Eastern Europe	16.5	15.9	16.0	3.66	3.30	3.52	3.63	60.2	52.3	56.8	58.0
EC-12	20.2	19.2	19.3	4.43	4.37	4.61	4.65	89.6	83.9	88.8	89.5
Other W. Europe	3.1	3.0	3.0	3.97	4.47	4.10	4.10	12.4	13.6	12.2	12.2
Mexico	7.5	8.2	8.5	1.88	2.09	1.88	1.88	14.1	17.3	16.0	16.0
USSR	56.0	52.9	54.0	1.87	2.14	1.90	1.84	104.8	113.3	102.5	99.5
Other Major Import. 2/	0.4	0.4	0.4	3.83	3.63	3.70	3.70	1.6	1.5	1.5	1.5
Other Foreign	159.0	161.8	160.5	1.53	1.59	1.59	1.59	242.9	257.1	254.8	255.8
Brazil	12.5	13.5	13.5	1.79	1.79	1.98	1.98	22.5	24.2	26.7	26.7
China	28.2	29.1	28.3	3.31	3.64	3.52	3.52	93.5	106.0	99.4	99.4
India	37.7	38.9	37.8	0.92	0.90	0.87	0.87	34.6	35.0	33.0	33.0
Indonesia	2.7	2.9	3.1	1.85	1.83	1.84	1.84	5.0	5.3	5.6	5.6
Nigeria	9.9	9.5	9.9	0.82	0.67	0.84	0.84	8.1	6.3	8.3	8.3
Philippines	3.6	3.8	3.9	1.24	1.24	1.24	1.24	4.5	4.7	4.9	4.9
Turkey	4.4	4.5	4.5	1.70	1.99	2.11	2.17	7.5	8.9	9.4	9.7
Others	59.8	59.7	59.6	1.13	1.12	1.13	1.15	67.3	66.7	67.6	68.3
BARLEY											
World	74.7	73.3		2.27	2.53			169.3	185.7	174.0	176.0
United States	3.4	3.0		2.62	3.00			8.8	9.1	9.3	10.4
Total Foreign	71.4	70.3	72.4	2.25	2.51	2.29	2.29	160.5	176.6	164.7	165.6
Australia	2.3	2.5	2.9	1.75	1.65	1.50	1.50	4.0	4.2	4.4	4.4
Canada	4.7	4.6	4.6	2.50	2.93	2.73	2.83	11.7	13.5	11.8	13.0
China	3.3	3.3	3.3	1.74	1.73	1.73	1.73	5.7	5.7	5.7	5.7
Eastern Europe	3.6	3.6	3.6	4.03	4.02	3.75	3.82	14.5	14.4	13.2	13.8
EC-12	12.6	12.3	12.1	4.05	4.13	4.13	4.16	51.0	50.8	49.6	50.3
Other W. Europe	1.5	1.5	1.5	3.87	4.35	3.91	3.91	5.9	6.4	5.9	5.9
Turkey	3.4	3.4	3.4	1.46	1.76	1.91	2.00	4.9	6.0	6.5	6.8
USSR	27.6	26.1	28.5	1.75	2.34	1.86	1.79	48.5	61.0	53.0	51.0
Others	12.4	13.0	12.5	1.15	1.12	1.16	1.19	14.3	14.6	14.7	14.9

FOOTNOTES AT END OF TABLE

JULY 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	June	July	1989/90	1990/91	June	July
CORN	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	126.1	127.0		3.65	3.69			460.7	469.2	492.1	493.4
United States	26.2	27.1		7.30	7.44			191.2	201.5	210.2	210.2
Total Foreign	99.9	99.9	102.7	2.70	2.68	2.74	2.76	269.6	267.7	281.9	283.2
Maj. Foreign Exporters	6.7	6.4	6.9	2.72	2.89	2.75	2.75	18.2	18.5	19.0	19.0
Argentina	1.7	2.0	2.2	3.06	4.00	3.27	3.27	5.2	7.8	7.2	7.2
South Africa	3.6	3.1	3.4	2.47	2.26	2.35	2.35	8.9	7.0	8.0	8.0
Thailand	1.4	1.4	1.3	2.93	2.74	2.88	2.88	4.1	3.7	3.8	3.8
Major Importers	21.2	19.6	21.9	3.93	3.46	3.80	3.89	83.3	67.8	84.5	85.2
Eastern Europe	7.1	6.4	6.6	4.14	3.29	4.00	4.29	29.2	21.1	27.8	28.3
EC-12	3.9	3.5	4.0	6.91	6.24	7.06	7.07	26.9	21.7	28.1	28.3
Other W. Europe	0.2	0.2	0.2	7.68	7.91	7.88	7.88	1.7	1.8	1.7	1.7
Mexico	5.8	6.6	7.0	1.68	1.97	1.71	1.71	9.8	13.0	12.0	12.0
USSR	4.1	2.8	4.0	3.71	3.50	3.63	3.63	15.3	9.8	14.5	14.5
Other Maj. Import. 2/	0.1	0.1	0.1	4.28	4.10	4.18	4.18	0.5	0.5	0.5	0.5
Other Foreign	72.0	73.9	73.8	2.33	2.45	2.42	2.42	168.0	181.4	178.4	178.9
Brazil	12.1	13.0	13.0	1.80	1.81	2.00	2.00	21.8	23.5	26.0	26.0
Canada	1.0	1.0	1.1	6.36	7.00	6.00	6.00	6.4	7.0	6.6	6.6
China	20.4	21.4	20.6	3.88	4.21	4.08	4.08	78.9	90.0	84.0	84.0
Egypt	0.8	0.8	0.9	5.37	5.43	5.59	5.59	4.5	4.6	4.8	4.8
India	5.9	5.9	5.9	1.61	1.61	1.53	1.53	9.4	9.5	9.0	9.0
Indonesia	2.7	2.9	3.1	1.85	1.83	1.84	1.84	5.0	5.3	5.6	5.6
Philippines	3.6	3.8	3.9	1.24	1.24	1.24	1.24	4.5	4.7	4.9	4.9
Zimbabwe	1.2	1.1	1.2	1.72	1.45	1.67	1.67	2.0	1.6	2.0	2.0
Others	24.4	24.0	24.2	1.46	1.47	1.47	1.49	35.5	35.2	35.6	36.1
SORGHUM											
World	40.6	39.6		1.35	1.34			54.8	53.2	54.6	54.3
United States	4.5	3.7		3.48	3.95			15.6	14.5	16.3	16.0
Total Foreign	36.1	35.9	36.0	1.08	1.08	1.07	1.07	39.1	38.7	38.3	38.3
Argentina	0.7	0.7	0.7	2.86	3.57	2.86	2.86	2.0	2.5	2.0	2.0
Australia	0.4	0.5	0.5	2.27	1.95	2.00	2.00	0.9	0.9	1.0	1.0
China	1.6	1.6	1.6	2.72	3.35	3.17	3.17	4.4	5.2	5.0	5.0
India	14.9	15.0	15.0	0.86	0.83	0.80	0.80	12.9	12.5	12.0	12.0
Mexico	1.3	1.3	1.2	2.88	2.85	2.92	2.92	3.8	3.7	3.5	3.5
Nigeria	4.4	4.4	4.4	0.80	0.64	0.80	0.80	3.5	2.8	3.5	3.5
South Africa	0.2	0.2	0.2	1.11	1.09	1.11	1.11	0.3	0.2	0.3	0.3
Sudan	3.1	3.0	3.0	0.52	0.50	0.50	0.50	1.6	1.5	1.5	1.5
Thailand	0.2	0.2	0.2	1.44	1.39	1.47	1.47	0.2	0.3	0.3	0.3
Others	9.2	9.1	9.2	1.03	1.00	1.01	1.01	9.5	9.1	9.3	9.3

FOOTNOTES AT END OF TABLE

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TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. June	1991/92 Proj. July	1989/90	Prel. 1990/91	1991/92 Proj. June	1991/92 Proj. July
OATS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	22.7	21.6		1.84	1.98			41.9	42.7	40.2	39.0
United States	2.8	2.4		1.95	2.16			5.4	5.2	4.4	4.1
Total Foreign	19.9	19.2	19.1	1.83	1.96	1.88	1.84	36.4	37.5	35.9	35.0
USSR	10.8	10.7	10.5	1.57	1.68	1.62	1.52	16.8	18.0	17.0	16.0
Maj. Foreign Exporters	3.7	3.3	3.4	1.97	2.14	2.01	2.10	7.3	7.2	6.9	7.2
Argentina	0.4	0.3	0.4	1.44	1.34	1.29	1.29	0.6	0.4	0.5	0.5
Australia	1.1	1.2	1.3	1.44	1.42	1.38	1.38	1.6	1.6	1.8	1.8
Canada	1.7	1.5	1.4	2.08	2.33	2.22	2.44	3.5	3.5	3.0	3.3
Sweden	0.4	0.4	0.4	3.54	4.42	3.86	3.86	1.5	1.6	1.6	1.6
Other Foreign	5.5	5.1	5.1	2.24	2.41	2.34	2.30	12.3	12.3	12.0	11.8
China	0.6	0.6	0.6	1.20	1.21	1.18	1.18	0.7	0.7	0.7	0.7
Eastern Europe	1.2	1.2	1.2	2.55	2.70	2.64	2.56	3.2	3.3	2.9	3.0
Czechoslovakia	0.1	0.1	0.1	3.24	4.55	4.00	4.00	0.3	0.4	0.4	0.4
Poland	0.8	0.7	0.7	2.72	2.84	2.70	2.70	2.2	2.1	1.9	1.9
EC-12	1.9	1.5	1.6	2.82	3.15	3.07	3.02	5.2	4.8	5.2	4.9
France	0.3	0.2	0.2	3.73	3.86	3.81	3.81	1.0	0.9	0.8	0.8
Germany	0.7	0.5	0.5	3.68	4.45	4.48	4.44	2.4	2.1	2.6	2.4
Finland	0.4	0.5	0.4	3.24	3.67	3.28	3.28	1.4	1.7	1.3	1.3
Norway	0.1	0.1	0.1	3.13	4.58	4.00	4.00	0.4	0.6	0.5	0.5
Others	1.3	1.2	1.2	1.12	1.09	1.11	1.11	1.4	1.4	1.4	1.4
RYE											
World	16.9	16.7		2.22	2.32			37.6	38.9	30.5	30.6
United States	0.2	0.2		1.77	1.70			0.3	0.3	0.3	0.3
Total Foreign	16.7	16.6	13.4	2.23	2.33	2.25	2.27	37.3	38.6	30.2	30.3
USSR	10.7	10.4	8.0	1.87	2.02	1.81	1.81	20.1	21.0	14.5	14.5
Maj. Foreign Exporter											
Canada	0.5	0.5	0.3	1.74	1.74	1.71	1.69	0.9	0.9	0.6	0.5
Other Foreign											
Eastern Europe	3.3	3.4	3.4	2.94	2.88	2.84	2.85	9.7	9.9	9.6	9.6
Hungary	0.1	0.1	0.1	2.06	2.46	2.22	2.22	0.2	0.2	0.2	0.2
Poland	2.9	3.1	3.0	2.95	2.86	2.85	2.85	8.6	8.8	8.6	8.6
Czechoslovakia	0.2	0.2	0.2	4.05	4.26	3.82	3.82	0.7	0.7	0.7	0.7
EC-12	1.6	1.6	1.2	3.33	3.35	3.69	3.83	5.3	5.3	4.5	4.7
Denmark	0.1	0.1	0.1	4.82	4.95	4.84	4.84	0.5	0.5	0.5	0.5
Germany	1.0	1.1	0.7	3.86	3.78	4.71	4.93	3.9	4.0	3.3	3.5
Others	0.6	0.6	0.5	2.29	2.38	2.17	2.17	1.3	1.5	1.0	1.0

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.
2/ Japan, Republic of Korea, and Taiwan.

JULY 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 5

Rice Area, Yield, and Production
World and Selected Countries and Regions

	AREA			YIELD				PRODUCTION (Rough Basis)				MILLING RATE				PRODUCTION (Milled Basis)			
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. June	1991/92 Proj. July	1989/90	Prel. 1990/91	1991/92 Proj. June	1991/92 Proj. July	1989/90	Prel. 1990/91	1991/92 Proj. June	1991/92 Proj. July	1989/90	Prel. 1990/91	1991/92 Proj. June	1991/92 Proj. July
	—Million Hectares—			—Metric Tons Per Hectare—				—Million Metric Tons—				—In Percent—				—Million Metric Tons—			
World	146.6	147.1		3.5	3.5			508.1	513.9	512.2	508.5	67.7	67.7	67.7	67.7	344.0	348.1	345.9	344.2
United States	1.1	1.1		6.4	6.2			7.0	7.0	7.0	7.0	73.0	73.0	70.0	71.6	5.1	5.1	4.9	5.0
Total Foreign	145.5	145.9	146.3	3.4	3.5	3.5	3.4	501.1	506.8	505.2	501.5	67.6	67.7	67.5	67.5	338.9	343.0	341.0	339.2
Maj. Foreign Exporters	16.8	16.5	16.8	2.3	2.2		2.3	38.5	35.7		38.2	64.0	63.8		64.0	24.6	22.8		24.4
Burma	4.7	4.8	4.7	2.9	2.9		2.9	13.5	13.7		13.4	60.0	60.0		60.0	8.1	8.2		8.0
Pakistan	2.1	2.0	2.1	2.3	2.3		2.3	4.8	4.7		4.8	66.7	66.7		66.7	3.2	3.1		3.2
Thailand	10.0	9.7	10.0	2.0	1.8		2.0	20.2	17.3		20.0	66.0	66.0		66.0	13.3	11.4		13.2
Major Importers	13.9	13.7	13.7	4.2	4.2		4.2	58.6	58.1		58.0	66.1	66.0		66.1	38.7	38.4		38.3
EC-12	0.3	0.4	0.4	6.2	6.4		6.0	2.1	2.4		2.3	67.0	67.4		67.4	1.4	1.6		1.5
Indonesia	10.5	10.3	10.4	4.2	4.4		4.3	44.7	45.0		44.6	65.0	65.0		65.0	29.1	29.2		29.0
Nigeria	0.6	0.7	0.7	1.4	1.4		1.4	0.9	0.9		0.9	60.0	60.0		60.0	0.5	0.6		0.6
Republic of Korea	1.3	1.2	1.2	6.4	6.2		6.4	8.1	7.7		7.9	72.8	72.6		72.6	5.9	5.6		5.7
Other Maj. Import. 1/	1.2	1.1	1.0	2.4	1.9		2.3	2.8	2.2		2.3	65.5	65.4		65.4	1.8	1.4		1.5
Other Foreign	114.8	115.7	115.9	3.5	3.6		3.5	403.9	413.0		405.4	68.2	68.2		68.2	275.5	281.8		276.5
Australia	0.1	0.1	0.1	8.0	8.6		7.9	0.9	0.8		0.9	71.5	71.5		71.5	0.7	0.5		0.6
Bangladesh	10.5	10.6	10.6	2.6	2.5		2.5	26.8	26.7		27.0	66.7	66.7		66.7	17.9	17.8		18.0
Brazil	4.3	4.5	5.3	1.7	2.1		1.9	7.2	9.3		10.0	68.0	68.0		68.0	4.9	6.3		6.8
China	32.7	33.1	32.6	5.5	5.6		5.5	180.1	185.0		180.0	70.0	70.0		70.0	126.1	129.5		126.0
India	42.2	42.2	42.0	2.6	2.7		2.6	111.1	112.5		109.5	66.7	66.7		66.7	74.1	75.0		73.0
Japan	2.1	2.1	2.1	6.2	6.3		6.2	12.9	13.1		12.9	72.8	72.8		72.8	9.4	9.6		9.4
Philippines	3.4	3.5	3.6	2.6	2.7		2.6	8.9	9.4		9.5	65.0	65.0		65.0	5.8	6.1		6.2
USSR	0.7	0.6	0.7	3.9	4.0		4.0	2.6	2.4		2.6	65.0	65.0		65.0	1.7	1.6		1.7
Vietnam	5.9	5.9	5.8	3.1	3.1		3.0	18.4	18.0		17.5	65.0	65.0		65.0	12.0	11.7		11.4
Others	12.9	13.2	13.1	2.7	2.7		2.7	35.0	35.8		35.4	66.1	66.2		66.1	23.1	23.7		23.4

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	June	July	1989/90	1990/91	June	July
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SOYBEANS											
World	58.26	54.06		1.84	1.92			107.27	103.62		107.01
United States	24.09	22.87		2.17	2.29			52.35	52.30		53.62
Total Foreign	34.16	31.20	32.20	1.61	1.65		1.66	54.92	51.32		53.40
Maj. Foreign Exporters	16.35	14.40	15.00	1.90	1.84		1.88	31.09	26.50		28.25
Argentina	4.95	4.75	5.00	2.17	2.32		2.15	10.75	11.00		10.75
Brazil	11.40	9.65	10.00	1.78	1.61		1.75	20.34	15.50		17.50
Other Foreign	17.81	16.80	17.20	1.34	1.48		1.46	23.83	24.82		25.15
Canada	0.54	0.49	0.58	2.26	2.71		2.33	1.22	1.33		1.35
China	8.06	7.60	7.95	1.27	1.50		1.45	10.23	11.40		11.50
Eastern Europe	0.70	0.36	0.28	0.97	1.07		1.30	0.68	0.39		0.36
EC-12	0.63	0.69	0.58	3.13	3.12		3.14	1.98	2.17		1.81
India	2.13	2.30	2.40	0.80	1.04		1.00	1.72	2.40		2.40
Indonesia	1.21	1.24	1.26	1.09	1.09		1.11	1.32	1.35		1.40
Paraguay	0.98	0.89	0.90	1.61	1.46		1.78	1.58	1.30		1.60
USSR	0.83	0.84	0.84	1.15	1.05		1.14	0.96	0.88		0.96
Others	2.74	2.39	2.42	1.52	1.51		1.56	4.17	3.61		3.77
COTTONSEED											
World	32.06	33.44		0.96	1.00			30.89	33.48		35.07
United States	3.86	4.75		1.10	1.14			4.24	5.41		5.76
Total Foreign	28.20	28.69	29.69	0.94	0.98		0.99	26.65	28.07		29.31
China	5.20	5.53	6.10	1.24	1.39		1.39	6.44	7.66		8.50
India	7.33	7.60	7.80	0.60	0.53		0.54	4.40	4.00		4.20
Pakistan	2.60	2.69	2.78	1.12	1.21		1.23	2.91	3.26		3.40
USSR	3.33	3.15	3.15	1.53	1.56		1.56	5.11	4.92		4.93
Others	9.74	9.71	9.86	0.80	0.85		0.84	7.79	8.22		8.29
PEANUTS											
World	19.82	19.52		1.11	1.13			22.06	22.12		22.52
United States	0.67	0.73		2.72	2.23			1.81	1.63		2.14
Total Foreign	19.16	18.79	19.12	1.06	1.09		1.07	20.25	20.48		20.38
Argentina	0.18	0.20	0.19	1.87	2.37		2.11	0.34	0.48		0.40
China	2.96	2.96	3.02	1.81	2.15		1.92	5.37	6.37		5.80
India	8.71	8.10	8.30	0.93	0.90		0.92	8.09	7.30		7.60
Senegal	0.78	0.92	0.90	1.04	0.73		0.77	0.82	0.67		0.70
South Africa	0.09	0.09	0.09	1.28	1.59		1.50	0.11	0.14		0.14
Sudan	0.55	0.54	0.53	0.73	0.60		0.75	0.40	0.33		0.40
Others	5.89	5.99	6.09	0.87	0.87		0.88	5.13	5.21		5.35

JULY 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	June	July	1989/90	1990/91	June	July
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SUNFLOWERSEED											
World	15.88	15.92		1.38	1.38			21.87	22.02		21.60
United States	0.72	0.75		1.10	1.38			0.80	1.03		1.52
Total Foreign	15.16	15.17	14.84	1.39	1.38		1.35	21.07	20.98		20.09
Argentina	2.80	2.30	2.50	1.36	1.70		1.40	3.80	3.90		3.50
China	0.72	0.70	0.71	1.49	1.71		1.62	1.06	1.20		1.15
EC-12	2.12	2.55	2.25	1.67	1.61		1.66	3.54	4.09		3.75
East Europe	1.27	1.23	1.17	1.81	1.70		1.77	2.29	2.09		2.08
USSR	4.46	4.67	4.70	1.59	1.41		1.45	7.07	6.56		6.80
Others	3.80	3.73	3.50	0.87	0.84		0.80	3.32	3.15		2.81
RAPESEED											
World 1/	17.12	18.12		1.28	1.42			21.85	25.78		27.09
Total Foreign	17.09	18.08	19.42	1.28	1.42		1.39	21.80	25.73		26.99
Canada	2.90	2.58	3.20	1.07	1.29		1.31	3.10	3.33		4.20
China	4.99	5.49	5.80	1.09	1.27		1.22	5.44	6.96		7.10
EC-12	1.81	2.13	2.38	2.96	2.91		2.97	5.34	6.21		7.07
East Europe	0.81	0.74	0.68	2.66	2.38		2.48	2.15	1.75		1.69
India	4.99	5.60	5.70	0.83	1.02		0.88	4.12	5.70		5.00
Others	1.59	1.54	1.66	1.04	1.16		1.16	1.65	1.78		1.93
FLAXSEED											
World	3.74	3.79		0.50	0.62			1.85	2.34		2.10
United States	0.07	0.10		0.47	0.95			0.03	0.10		0.11
Total Foreign	3.67	3.69	3.50	0.50	0.61		0.57	1.82	2.24		1.98
Argentina	0.58	0.58	0.55	0.90	0.83		0.84	0.52	0.48		0.46
Canada	0.60	0.73	0.54	0.83	1.29		1.16	0.50	0.94		0.63
India	1.18	1.20	1.20	0.29	0.33		0.33	0.34	0.40		0.40
USSR	0.97	0.85	0.85	0.24	0.19		0.21	0.23	0.16		0.18
Others	0.36	0.34	0.36	0.67	0.77		0.89	0.24	0.26		0.32
MAJOR OILSEEDS	*146.88*	*144.84*		*1.40*	*1.45*			*205.80*	*209.35*		*215.39*
United States	29.44	29.23		2.01	2.07			59.29	60.53	60.50	63.24
Total Foreign	117.44	115.61	118.76	1.25	1.29		1.28	146.51	148.82		152.15
COPRA	--	--	--	--	--	--	--	4.88	4.98		4.81
PALM KERNEL	--	--	--	--	--	--	--	3.33	3.36		3.59
TOTAL OILSEEDS	--	--	--	--	--	--	--	*214.01*	*217.68*	*223.00*	*223.79*
PALM OIL 2/	--	--	--	--	--	--	--	10.91	11.04		11.86

1/ Includes U.S. estimates by the WAOB and Interagency Oilseeds Committee. 2/ Not included in total oilseeds.

JULY 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 7

Cotton Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	June	July	1989/90	1990/91	June	July
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	31.6	33.3		552	566			80.0	86.6	90.7	90.3
United States	3.9	4.7		688	711			12.2	15.5	16.0	16.2
Total Foreign	27.7	28.5	29.4	533	542	556	548	67.8	71.1	74.7	74.1
Maj. Foreign Exporters	13.1	13.3	13.7	727	783		778	43.7	47.7		49.1
Australia	0.2	0.3	0.3	1,326	1,411		1,322	1.4	1.8		1.7
Central America 1/	0.1	0.1	0.1	832	802		793	0.3	0.3		0.3
China	5.2	5.6	6.1	728	805		803	17.4	20.7		22.5
Egypt	0.4	0.4	0.4	683	719		755	1.3	1.4		1.3
Mexico	0.2	0.2	0.3	891	913		837	0.8	0.8		1.0
Pakistan	2.6	2.7	2.8	560	607		612	6.7	7.5		7.8
Sudan	0.3	0.2	0.2	456	499		498	0.6	0.4		0.4
Turkey	0.7	0.7	0.6	851	930		887	2.8	2.9		2.5
USSR	3.3	3.2	3.1	805	827		821	12.3	12.0		11.5
Major Importers 2/	0.4	0.4	0.3	886	794		911	1.5	1.5		1.4
Other Foreign	14.2	14.9	15.4	346	321		335	22.6	21.9		23.6
Argentina	0.6	0.6	0.6	486	444		465	1.3	1.3		1.3
Brazil	1.9	2.0	2.0	347	340		381	3.0	3.1		3.5
India	7.3	7.6	7.8	315	264		279	10.6	9.2		10.0
Syria	0.2	0.2	0.2	930	963		934	0.7	0.7		0.7
Others	4.3	4.5	4.8	358	370		370	7.0	7.7		8.2

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

JULY 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 8

The table below presents a 10-year record of the difference between the July projections and the final estimates. Using world wheat production as an example, changes between the July projection and the final estimate have averaged 15.7 million tons (3.1 percent) and ranged from -34.6 to 15.4 million tons. The July projection has been below the final 6 times and above the final 4 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 - 1990/91 1/					
	Difference		Lowest	Highest	Below	Above
	Average	Average	Difference		Final	Final
	Percent	---Million Metric Tons---			Number of Years 2/	
WHEAT						
World	3.1	15.7	-34.6	15.4	6	4
U.S.	2.0	1.3	-2.6	2.2	4	6
Foreign	3.5	15.5	-32.0	16.1	6	4
COARSE GRAINS 3/						
World	2.3	17.9	-22.2	53.6	6	4
U.S.	8.2	15.4	-29.4	57.7	5	5
Foreign	1.8	10.3	-16.0	24.2	4	6
RICE (Milled)						
World	2.9	9.0	-24.0	13.0	7	3
U.S.	4.6	0.2	-0.5	0.3	5	3
Foreign	2.9	9.0	-24.3	12.7	7	3
SOYBEANS						
World	3.6	3.4	-3.6	7.5	3	7
U.S.	5.8	2.9	-5.4	9.7	5	5
Foreign	5.9	2.5	-3.0	5.0	4	6
		---Million 480-lb. Bales---				
COTTON						
World	3.8	3.0	-13.3	5.7	7	3
U.S.	9.2	1.2	-2.8	1.0	8	2
Foreign	3.3	2.3	-12.1	4.7	4	5
UNITED STATES		-------Million Bushels-------				
CORN	17.9	1,101	-3,327	2,379	5	5
SORGHUM	16.6	122	-228	171	6	4
BARLEY	13.2	52	-73	206	5	5
OATS	21.2	68	-77	231	3	7

1/ The final estimate for 1981/82-1989/90 is defined as the first November estimate following the marketing year and for 1990/91 last month's estimate.
2/ May not total ten if projection was the same as the final.
3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

July 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

MAP 1

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

JULY 11, 1991

NOAA/USDA JOINT AGRICULTURAL WEATHER FACILITY

CANADA

Adequate to abundant rain falls across the Prairies, soaking grains and oilseeds. Recent drier and warmer weather in Alberta promotes growth.

UNITED STATES

Warm temperatures accelerate crop development east of the Rocky Mountains. Wet soils delay completion of planting in the western Corn Belt and Delta. Cool weather slows crop growth in Pacific Northwest.

SOUTH AMERICA

In Argentina, periodic rains delay soybean harvesting and winter wheat planting. Favorable growing conditions exist in southern Brazil for winter grain.

EUROPE

Recent warmer weather promotes summer crop development. Hot, dry weather persists in Spain, while excessive rain inundates the Balkan countries. Winter wheat harvesting. advances northward.

WESTERN USSR

Heat wave from June 20-July 5 and unfavorable dryness stress crops in the east. Ample moisture favors crops in the west.

SOUTH ASIA

Weak monsoon delays oilseed and cotton planting in northern India. Favorable conditions prevail in southern and eastern rice areas.

NEW LANDS

Drought deteriorates crop conditions in most spring grain areas.

EASTERN ASIA

Heavy rain along the Yangtze causes widespread flooding. Favorable harvest conditions exist for winter wheat, except in Hebei. Beneficial rains fall along the southern coast and Taiwan easing long-term dry conditions, but portions of Jiangxi and Hunan remain dry.

SOUTHEAST ASIA

Unfavorable warm, dry weather in Thailand stresses corn and rice. Rainfall increases in the Philippines but dryness persists in Luzon's primary grain areas.

AUSTRALIA

Adequate rainfall promotes winter grain establishment in most areas. Recent showers ease dryness in southern Queensland and northern New South Wales.

(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 447-7917.

WEATHER BRIEFS

SOVIET NEW LANDS: DRYNESS CONTINUED

Precipitation during June, 1991 continued to be below normal across a major portion of the spring wheat production area of the Soviet New Lands. The greatest impact has been in Kazakhstan's central growing region, where precipitation from April 7 - July 10, 1991 has been less than 25 percent of normal. Precipitation for this same period has been less than 50 percent of normal across the western portion of West Siberia, the southern Urals, and northern Kazakhstan, and near normal-to-normal in eastern West Siberia. The trend for above normal temperatures in the western New Lands and below normal temperatures in the east, continued during much of the period of June 12 - July 10, 1991. The hot temperatures (2 to 4 degrees above normal) and low surface soil moisture in the west and central New Lands caused continued unfavorable conditions for spring grains advancing through reproduction. Historically the New Lands produce about 65 percent of the Soviet Union's spring wheat. Hot and dry conditions in the Volga Valley of European U.S.S.R. during late June and early July, when grains were in the filling stage, have raised concern as well.

INDIA: SOUTHWEST MONSOON STALLS

Though the southwest monsoon began on schedule across southern India in late May and early June, 1991, its progress northward has stalled during late June and early July, leaving large areas of northern India unseasonably hot and dry. Cumulative rainfall has been negligible since June 1, 1991 from Gujarat northeastward to Uttar Pradesh. For the second year in a row the monsoon is late in starting in Gujarat, delaying planting of groundnuts and rainfed cotton. Most of the rice in northwest India is irrigated and reservoirs are full. However, rice transplanting was underway by early July, and unseasonably hot temperatures stressed the transplants. Soybean planting in Madhya Pradesh has also been delayed, as the monsoon had just reached the soybean region when it stalled.

THAILAND: BELOW NORMAL RAINFALL

Seasonal precipitation, as of July 10, 1991, remains below normal across much of Thailand's primary grain regions. Precipitation across the major rice and corn regions was highly variable during June, 1991, with some areas receiving only 25 percent of normal, while other areas received upto 75 percent. Seasonably warm temperatures accompanied the dryness stressing vegetative and reproductive crops.

PHILIPPINES: DROUGHT CONTINUES IN NORTHERN LUZON

Precipitation was near normal-to-normal during June and early July, 1991 for southern Luzon and the central islands. However, precipitation was only 25-50 percent of normal in northern Luzon. Precipitation in the Cagayan Valley was 25 percent of normal in June. Precipitation has remained below normal during early July over northern Luzon and combined with warm temperatures to stress rice and corn crops.

PRODUCTION BRIEFS

AUSTRALIA: SUGAR CROP REVISED DOWNWARD

Australia's 1991/92 sugar production is estimated at 3.2 million tons, down 13 percent from the May forecast, according to the U.S. agricultural counselor in Canberra. The 1991/92 crop suffered from a December 1990 cyclone which reduced yields in some growing areas although the associated rain provided much needed moisture for crop development. The following 4 months were abnormally dry with reports of the driest March and April since the late 1870's in some important Queensland sugarcane growing areas. Sugarcane growers' incomes are expected to be reduced significantly.

ETHIOPIA: COFFEE PRODUCTION ESTIMATE REVISED UPWARD

Estimated Ethiopian coffee production has been revised upward to 3.5 million 60-kilogram bags for 1990/91 from the previous estimate of 3.0 million in June, 1991 (see WAP 6-91), according to the U.S. embassy in Addis Ababa. The forecast for 1991/92 has also been revised upward from 3.0 million bags to 3.5 million. Three fairly distinct farming systems are discernible in coffee production: peasant cultivation (accounting for 86 percent), state farms (6 percent), and forest or wild coffee (8 percent). Fourteen varieties of arabica are grown.

Coffee's contribution to Ethiopia's gross domestic product, its share of total agricultural production, and the amount of revenue it generates for the central treasury are important to the economic survival of the country. The level of employment it provides and its status as the country's largest income earner are critical to the Ethiopian economy.

PHILIPPINES: MT. PINATUBO ERUPTIONS IMPACT RICE CROP

According to the U.S. agricultural counselor in Manila, the major eruptions of Mt. Pinatubo on June 12-16 caused limited damage to standing rice, but there may be a reduction in agricultural output in west-central Luzon during the July-December wet season. Moreover, continuing minor eruptions and the onset of the typhoon season threaten to cause damaging mud-flows and flooding. Deposits of volcanic ash cover large portions of the surrounding rice areas. Virtually no standing rice was lost since the dry-season crop had been largely harvested just prior to the volcanic activity. However, in the immediate surrounding area, up to a foot of ash cover may make the land unplantable for the main wet-season (July-December) crop. Preliminary indications are that up to 20,000 hectares are unplantable in the near term, while an undetermined additional area may experience planting delays. The total 1991/92 area for harvest is estimated at 3.6 million hectares.

CHINA: TOBACCO PRODUCTION DOWN IN 1991

The U.S. agricultural counselor in Beijing reports that 1991 tobacco production is estimated at 2.622 million tons (farm-sales-weight basis), down from the revised 1990 level of 2.624 million tons. Flue-cured tobacco is estimated at 2.250 million tons, down from 2.260 million in 1990 and 2.405 million in 1989. The decline in production since 1989 is due to higher returns for cotton and oilseeds and more stringent grading standards for tobacco. Tobacco production might have declined even more in the past 2 years but local governments have encouraged farmers to maintain production because it generates tax income. Since 1989 production of dark-air and sun-cured tobacco has fallen from 270,800 tons to 200,000 tons for both 1990 and 1991. Estimated production for other types for 1991 (burley, 80,000 tons; oriental, 7,700 tons; and cigar 79,900 tons) has been increasing due to enlarged export prospects in the case of cigar tobacco and higher demand for blending in local cigarette production for the other types.

UGANDA: COFFEE PRODUCTION ESTIMATE REVISED DOWNWARD

Ugandan 1990/91 coffee production is estimated at 2.7 million 60-kilogram bags, 10 percent less than the 3.0-million-bag June estimate, according to the U.S. Embassy in Kampala. The 1991/92 forecast remains unchanged at 3.0 million bags. However, the 1989/90 outturn was revised downward by 19 percent from 3.1 million to 2.5 million bags, and the 1988/89 estimate was revised upward, by 10 percent to 3.3 million bags from 3.0 million. The small 1989/90 crop resulted from low returns to farmers, limiting their ability to purchase fertilizers or fungicides. When inputs became available, farmers used them on crops with higher returns than coffee. Many farmers stopped pruning their coffee trees and some uprooted them to plant more profitable crops such as bananas.

Uganda's (mainly robusta) coffee is produced by smallholders throughout the central part of the country from the slopes of Mount Elgon in the east to the West Nile in the northwest to Kigezi in the southwest. Area under coffee is estimated at 400,000 hectares and has not changed much in the past decade. It is reported that coffee trees generally range in age from 30 to 50 years.

JAPAN: LOWER GOVERNMENT PURCHASE PRICE FOR 1991 RICE CROP

The new Japanese Government producer price for the 1991 rice crop will be about 1 percent lower than last year. Since 1987 the producer price has been reduced four times for a total of 12.2 percent. The Ministry of Agriculture, Forestry, and Fisheries and the Ministry of Finance had originally planned to reduce prices by 2 to 3 percent in an attempt to narrow the gap between domestic and overseas market prices, but they agreed to the smaller cut in the face of farmer opposition. Members of the legislature who represent farmers argued that the price should have been left unchanged since rice growers face severe hardships as a result of past price reductions, increased production costs, labor shortages, and hikes in interest payments.

TAIWAN: DROUGHT IMPACT ON TAIWAN'S AGRICULTURE

The Taiwan Council of Agriculture (COA) has released statistics detailing the impact of this year's spring drought on agricultural production in Taiwan. Agricultural losses totaled 3,680 million New Taiwan Dollars (NTD) (U.S.$135 million) as of June 20, compared to total agricultural output value of NTD 313,544 ($11,570 million) in 1990. Less than 1 percent of the first rice crop, Taiwan's leading farm income source was damaged, but about 9 percent of Taiwans's corn was damaged during the drought. The peanut crop also was affected by the drought, but fruit and vegetable production was not badly hurt, and the resumption of rain in the second half of June allowed farmers to plant the second rice crop. The COA also reported production losses in aquaculture and forestry, but the livestock sector was unharmed. The authorities have developed a package of relief measures for the nine counties most affected by the drought. The package includes low interest loans, flexible terms, and direct cash payments to rice, corn, peanut, and fish producers.

PARAGUAY: ECONOMIC INTEGRATION MAY IMPACT THE AGRICULTURE SECTOR

The Treaty of Asuncion was signed on March 26, 1991 creating the Mercosur (Mercado Comun Del Sur, or Southern Common Market), which establishes a framework for economic integration between Brazil, Argentina, Uruguay, and Paraguay. The common market is intended to allow the free movement of goods, services, and people between the four countries by the end of 1995. Each country and the various sectors within each country will be impacted by the integration differently. Paraguay and Uruguay will receive preferential treatment during the transition period (1991-1995), due to the small size of their economies. As exporting products to neighboring countries becomes easier, incentives to boost production within the agricultural sector should increase.

Paraguayan exports may increase if the Mercosur eliminates conditions that currently inflate costs and restrict trade. For example, exports of beef to Brazil have faced stiff competition from the European Community, which provides beef at subsidized prices. Paraguay hopes to obtain improved access to the Brazilian beef market by establishing duties against such subsidized imports. Fresh tomato exports to Argentina were blocked in 1986, when the Argentine government imposed an import quota on Paraguayan tomatoes. If these quotas are abolished, Paraguayan growers (who have the advantage of a longer growing season) could increase exports of tomatoes and other fruits and vegetables. Soybean and cotton exports to Brazil also may increase. Conversely, Paraguay may be forced to end its periodic bans on the importation of Argentine wheat, which is of better quality and lower in price then domestic wheat. This could lead to a reduction in Paraguayan wheat production. However, the Paraguayan Ministry of Agriculture believes that the wheat sector will maintain production because wheat is double-cropped with soybeans and provides off-season income for soybean producers.

CHINA: SEVERE FLOODING CAUSES CROP LOSSES

Unusually heavy rain from mid-May through early July has caused severe flooding and some crop losses in central China this year. Reports in the Chinese press state that by the end of June, the worst flooding in 70 years had affected more than 8.7 million hectares of farmland, killed more than 800 people and caused billions of dollars in damage. Hardest hit were the southern section of Henan and the north-central provinces of Anhui and Jiangsu, although significant flooding also was reported in Zhejiang, western Sichuan, and northern Hebei provinces. These provinces had anticipated record or near-record wheat crops prior to the start of the rains, which struck during the harvest season. Chinese authorities now estimate that several million tons of wheat may have been lost from the flood-affected areas, as well as an undetermined amount of rapeseed. The persistent rain also lowered wheat quality in many areas. However, these crop losses have been partially offset by record wheat harvests in Sichuan, Shandong, and Shaanxi provinces. The flooding also may have hurt rice, cotton, and other summer-sown crops in central China, but the amount of damage is unknown at this time.

ARGENTINA: GRAPE CROP DOWN DUE TO WEATHER

The recently harvested 1991 grape crop is estimated to have fallen 30 to 35 percent below the 1990 crop of 2.6 million tons according to a report from the U.S. agricultural counselor in Buenos Aires. Irrigation water shortages, due to insufficient snowfall in the mountains, plus hail storms in several areas caused the downturn. The southern region of Mendoza province was most affected. Grape production in Mendoza mainly is destined for wine and concentrated grape juice production while grapes from neighboring San Juan province are used for table grapes, raisins, and white wine.

YUGOSLAVIA: DRIED PRUNE OUTPUT REDUCED

In Yugoslavia the final estimate of dried prune production in 1990 is 5,239 tons, down over 50 percent from the 1989 level of 12,148 tons, according to the U.S. agricultural attache in Belgrade. The decline largely is due to reduced export demand by the USSR, its biggest market. Prospects for 1991 production generally are unfavorable as a cold, wet spring cut prospects for fresh plum production and export markets for dried prunes are viewed as being unfavorable.

FEATURE COMMODITY ARTICLES

EUROPEAN COMMUNITY GRAIN PRODUCTION SITUATION

Total grain production (excluding rice) in the European Community (EC) for 1991/92 is projected at 178.3 million tons from an area of 36.3 million hectares. This is an increase of 6 percent from an estimated crop of 168.7 million tons produced during 1990/91 and up slightly from last month's forecast. Growing conditions this year generally have been favorable throughout northern Europe with predominately cool, wet weather. The Iberian peninsula has experienced abnormally dry conditions which have affected grain crops severely.

Wheat: Production in the EC for 1991/92 is projected at a record 88.8 million tons, 5 percent above last year's 84.8 million tons. Harvested area is expected to be up 3 percent from last year to a record 17.0 million hectares. Weather has been nearly ideal for wheat across northern Europe this season. Conditions generally were favorable with adequate moisture and mild temperatures. France is by far the largest producer of wheat in the EC followed by the United Kingdom and Germany. Both France and the United Kingdom are expected to produce record wheat crops again this year. The Iberian peninsula on the other hand has suffered from severe drought since March as well as occasional freezing temperatures during April. More recently the crops there have been stressed by hot weather.

The EC's recent wheat production records have been caused by large increases in area harvested, switching from spring to winter varieties, favorable weather, strong prices, and the introduction of new high yielding varieties. This upward trend in wheat production will likely continue.

Barley: Production for 1991/92 is projected at 50.3 million tons, down 1 percent from last year's 50.8 million tons due to lower sown area. EC barley area has been declining steadily from a high of 14.5 million hectares in 1979 to 12.1 million this year, a reduction of 17 percent. In general, spring barley sowings have fallen because of low yields and prices relative to winter barley and wheat. Wheat and oilseeds have replaced much of the shifted spring barley area. Germany and France are the two major barley producers in the EC with Germany producing a projected 14.5 million tons and France producing 10.1 million. The favorable growing conditions experienced by wheat in northern Europe also improved prospects for barley production. Spanish barley production has suffered due to this year's unfavorable weather in the Iberian peninsula and is projected to total only 9.0 million tons, the lowest level since 1986.

Oats: The projected 1991/92 production is 4.9 million tons from an area of 1.6 million hectares. This year's production is up 4 percent from last year. Area sown to oats in the EC has been declining since the large crops of the early 1970's. Set-aside programs have significantly reduced area sown to oats and mixed grains this year because yields have been lagging the overall average of other crops.

Corn: Production for 1991/92 is projected at 28.3 million tons, up 30 percent from last year's drought-reduced crop and only 1 percent below the record crop produced in 1988. Corn area is estimated at 4.0 million hectares, a return to the record level of 1988 due to favorable rainfall this winter and high prices relative to other grains. In general, corn area in the EC has remained relatively constant over the past 10 years, averaging 3.8 million hectares. In Spain, dry weather again this year has caused some problems for corn during the germination and emergence stages; however, since most corn is grown under irrigation the effects of the dryness likely will be moderated. The French crop is expected to produce record yields following last year's drought.

Rye: Production for 1991/92 is projected at 4.7 million tons, down 12 percent from last year. Area planted to rye is estimated at 1.2 million hectares, a decline from the high of 1.8 million in the early 1980's. Area tends to remain small since average yields are lower than those of other grains. Rye is traditionally sown in less fertile soils except in the case of contract sowing for processors. The cost of seed for the hybrid varieties that are generally grown under contract is about 150 percent more than that for common varieties.

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TABLE 9

EC-12 GRAIN AREA

(1,000 Hectares)

	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91	91/92
Barley										
Bel-Lux	149	154	152	135	147	140	137	125	107	103
Denmark	1,485	1,359	1,180	1,104	1,078	943	1,165	988	887	880
France	2,388	2,140	2,117	2,248	2,075	1,967	1,862	1,810	1,760	1,750
Germany	3,002	2,924	2,872	2,831	2,842	2,740	2,710	2,625	2,613	2,560
Greece	311	312	334	326	284	267	220	225	245	210
Ireland	334	304	294	298	283	276	266	263	237	230
Italy	352	383	434	468	465	445	450	471	467	420
Netherlands	44	37	34	39	42	50	63	50	40	35
Portugal	77	88	97	86	87	84	74	125	55	75
Spain	3,615	3,735	4,023	4,246	4,340	4,352	4,175	4,260	4,359	4,300
United Kingdom	2,222	2,143	1,978	1,965	1,917	1,831	1,913	1,662	1,529	1,515
EC-12	*13,979*	*13,579*	*13,515*	*13,746*	*13,560*	*13,095*	*13,035*	*12,604*	*12,299*	*12,078*
Corn										
Bel-Lux	7	5	8	7	8	6	7	7	8	8
France	1,646	1,654	1,730	1,857	1,869	1,737	1,995	1,910	1,600	1,900
Germany	161	170	186	183	193	201	209	219	257	290
Greece	163	171	205	207	201	245	228	180	162	195
Italy	1,011	986	961	923	849	768	843	804	768	850
Netherlands	1	1	1	0	0	0	0	1	1	1
Portugal	352	311	319	241	258	220	250	260	272	270
Spain	418	354	440	526	524	540	556	510	408	480
EC-12	*3,759*	*3,652*	*3,850*	*3,944*	*3,902*	*3,717*	*4,088*	*3,891*	*3,476*	*3,994*
Mixed Grain										
Denmark	4	3	3	3	3	3	3	3	3	3
France	143	133	155	171	198	214	113	130	140	150
Germany	73	18	27	22	20	18	18	18	21	18
Spain	8	5	5	5	5	8	9	9	47	57
United Kingdom	10	8	8	7	7	6	5	5	5	4
EC-12	*238*	*167*	*198*	*208*	*233*	*249*	*148*	*165*	*216*	*232*

July 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 9 (Continued)

EC-12 GRAIN AREA

(1,000 Hectares)

	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91	91/92
Oats										
Bel-Lux	52	28	27	29	21	21	22	20	14	14
Denmark	43	29	31	37	27	18	43	27	20	25
France	518	434	433	425	308	267	261	260	220	210
Germany	1,106	892	830	875	768	708	724	658	473	540
Greece	52	48	44	42	42	40	40	40	40	40
Ireland	23	22	24	23	21	20	20	19	19	19
Italy	219	209	191	182	184	176	171	169	158	150
Netherlands	24	14	12	11	7	9	13	8	3	5
Portugal	170	191	185	190	194	197	167	188	108	160
Spain	442	454	479	459	394	353	335	345	350	370
United Kingdom	129	108	106	133	95	99	120	119	106	106
EC-12	*2,778*	*2,429*	*2,362*	*2,406*	*2,061*	*1,908*	*1,916*	*1,853*	*1,511*	*1,639*
Rice, Milled										
France	5	7	9	11	12	12	14	17	19	20
Greece	16	14	16	16	18	18	21	16	16	17
Italy	178	184	180	187	193	191	199	206	214	210
Portugal	34	27	30	30	32	32	33	33	33	33
Spain	68	41	73	74	79	76	80	59	90	95
EC-12	*301*	*273*	*308*	*318*	*334*	*329*	*347*	*331*	*372*	*375*
Rye										
Bel-Lux	8	7	9	8	10	13	11	11	13	13
Denmark	55	77	122	127	120	136	81	101	110	95
France	110	97	96	84	74	75	75	75	65	65
Germany	1,075	1,169	1,168	1,127	1,105	1,078	997	1,013	1,056	700
Greece	3	4	7	9	11	13	15	15	15	15
Italy	13	11	9	9	8	8	8	8	8	8
Netherlands	6	7	6	5	4	6	7	7	9	8
Portugal	194	133	131	122	124	128	121	122	98	110
Spain	212	217	231	211	221	222	222	227	206	200
United Kingdom	6	7	6	8	6	7	7	7	7	7
EC_12	*1,682*	*1,729*	*1,785*	*1,710*	*1,683*	*1,686*	*1,544*	*1,586*	*1,587*	*1,221*

July 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 9 (Continued)

EC-12 GRAIN AREA

(1,000 Hectares)

	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91	91/92
Sorghum										
France	56	54	59	44	46	37	42	70	70	50
Italy	20	25	22	15	13	14	19	22	24	25
Spain	27	20	21	21	19	14	17	16	16	15
EC-12	*103*	*99*	*102*	*80*	*78*	*65*	*78*	*108*	*110*	*90*
Wheat										
Bel-Lux	183	203	194	194	198	199	204	220	224	229
Denmark	180	243	333	340	354	398	309	446	536	560
France	4,845	4,811	5,100	4,832	4,905	4,959	4,807	5,000	5,180	5,360
Germany	2,169	2,409	2,381	2,356	2,397	2,419	2,508	2,547	2,430	2,500
Greece	1,033	1,002	924	848	872	869	880	890	880	1,010
Ireland	57	59	78	78	76	57	60	62	73	80
Italy	3,326	3,328	3,274	3,034	3,136	3,087	2,876	2,943	2,773	2,700
Netherlands	131	148	143	128	118	111	114	138	141	140
Portugal	366	331	280	282	317	324	294	334	180	225
Spain	2,662	2,603	2,306	2,043	2,114	2,223	2,333	2,295	2,006	2,170
United Kingdom	1,663	1,695	1,939	1,902	1,997	1,994	1,886	2,106	2,050	2,020
EC-12	*16,615*	*16,832*	*16,952*	*16,037*	*16,484*	*16,640*	*16,271*	*16,981*	*16,473*	*16,994*

July 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 10

EC-12 GRAIN PRODUCTION

(1,000 Metric Tons)

	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91	91/92
Barley										
Bel-Lux	814	705	934	746	879	738	802	706	592	600
Denmark	6,357	4,423	6,072	5,251	5,134	4,292	5,419	4,959	4,984	4,600
France	10,036	8,759	11,699	11,470	9,950	10,528	9,800	9,840	10,100	10,100
Germany	13,515	12,826	14,422	14,056	13,670	12,769	13,385	14,416	13,992	14,500
Greece	872	572	831	619	739	626	550	500	480	500
Ireland	1,530	1,403	1,666	1,410	1,338	1,487	1,370	1,475	1,292	1,220
Italy	1,060	1,174	1,618	1,630	1,543	1,708	1,561	1,644	1,702	1,600
Netherlands	247	177	192	197	262	262	302	251	219	185
Portugal	51	54	135	65	90	100	51	87	62	50
Spain	5,269	6,662	10,789	10,698	7,431	9,282	12,070	9,100	9,414	9,000
United Kingdom	10,960	9,980	11,055	9,740	10,015	9,225	8,705	8,070	8,000	7,900
EC-12	*50,711*	*46,735*	*59,413*	*55,882*	*51,051*	*51,017*	*54,015*	*51,048*	*50,837*	*50,255*
Corn										
Bel-Lux	52	39	53	51	53	40	54	54	50	50
France	10,400	10,400	10,384	12,367	11,470	12,454	14,578	13,400	9,500	14,000
Germany	1,057	935	1,038	1,218	1,327	1,252	1,591	1,633	1,624	1,850
Greece	1,449	1,550	1,990	1,822	1,921	2,300	1,850	1,650	1,400	1,900
Italy	6,847	6,669	6,672	6,357	6,401	5,762	6,318	6,359	5,864	6,700
Netherlands	1	1	1	0	0	0	0	6	4	5
Portugal	421	424	483	531	628	620	647	674	643	645
Spain	2,330	1,803	2,529	3,414	3,424	3,526	3,557	3,100	2,600	3,100
EC-12	*22,557*	*21,821*	*23,150*	*25,760*	*25,224*	*25,954*	*28,595*	*26,876*	*21,685*	*28,250*
Mixed Grain										
Denmark	16	7	7	8	8	8	7	7	8	7
France	459	409	624	671	692	931	449	560	590	640
Germany	246	42	98	67	70	50	50	50	90	50
Spain	9	4	8	7	7	10	11	10	97	120
United Kingdom	39	35	35	30	29	26	20	20	20	20
EC-12	*769*	*497*	*772*	*783*	*806*	*1,025*	*537*	*647*	*805*	*837*

July 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 10 (Continued)

EC-12 GRAIN PRODUCTION

(1,000 Metric Tons)

	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91	91/92
Oats										
Bel-Lux	225	110	122	126	81	82	96	63	52	53
Denmark	178	86	150	152	111	94	202	125	121	120
France	1,802	1,374	1,892	1,803	1,007	1,045	984	970	850	800
Germany	4,625	2,989	3,673	4,024	3,353	3,043	2,941	2,422	2,105	2,400
Greece	82	54	72	62	79	62	73	62	62	70
Ireland	93	108	131	100	97	100	98	103	116	108
Italy	359	307	433	363	397	361	383	296	306	300
Netherlands	136	61	58	58	40	47	60	32	16	25
Portugal	86	99	195	119	153	155	81	130	62	110
Spain	443	464	788	680	433	502	537	494	524	460
United Kingdom	575	465	516	615	505	450	545	530	550	500
EC-12	*8,604*	*6,117*	*8,030*	*8,102*	*6,256*	*5,941*	*6,000*	*5,227*	*4,764*	*4,946*
Rice, Milled										
France	17	23	23	40	39	38	48	63	75	78
Greece	52	52	57	67	75	73	72	68	60	63
Italy	620	648	658	799	728	746	750	921	963	870
Portugal	93	71	87	96	97	94	95	96	99	96
Spain	281	157	306	321	346	338	349	238	398	420
EC-12	*1,063*	*951*	*1,131*	*1,323*	*1,285*	*1,289*	*1,314*	*1,386*	*1,595*	*1,527*
Rye										
Bel-Lux	33	28	42	33	55	56	56	56	63	64
Denmark	235	315	608	565	546	513	366	487	544	460
France	327	278	321	283	200	275	260	270	240	240
Germany	3,822	3,738	4,493	4,382	4,224	3,928	3,419	3,915	3,989	3,450
Greece	6	9	15	20	23	25	31	30	30	30
Italy	32	28	24	23	22	20	18	21	21	21
Netherlands	26	26	25	19	19	25	28	33	36	35
Portugal	119	93	115	97	100	108	77	98	77	85
Spain	169	253	315	273	220	320	357	336	274	250
United Kingdom	27	24	28	35	30	32	33	36	36	40
EC-12	*4,796*	*4,792*	*5,986*	*5,730*	*5,439*	*5,302*	*4,645*	*5,282*	*5,310*	*4,675*

July 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 10 (Continued)

EC-12 GRAIN PRODUCTION

(1,000 Metric Tons)

	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91	91/92
Sorghum										
France	276	255	257	202	183	196	254	305	275	300
Italy	91	100	105	56	82	80	107	139	114	120
Spain	115	79	95	99	97	71	96	85	90	85
EC-12	*482*	*434*	*457*	*357*	*362*	*347*	*457*	*529*	*479*	*505*
Wheat										
Bel-Lux	1,063	1,062	1,330	1,204	1,342	1,114	1,321	1,478	1,409	1,470
Denmark	1,207	1,548	2,446	1,972	2,177	2,285	2,080	3,224	3,953	4,050
France	25,368	24,807	33,241	29,262	26,665	27,234	29,540	32,100	33,700	34,500
Germany	11,372	12,548	14,126	13,802	14,601	13,972	15,622	14,482	15,242	16,300
Greece	2,983	2,043	2,646	1,775	2,200	2,118	2,300	1,984	1,680	2,660
Ireland	380	377	585	467	399	373	417	474	601	600
Italy	8,903	8,514	10,057	8,461	9,102	9,381	7,952	7,413	8,108	8,400
Netherlands	967	1,043	1,131	851	940	769	827	1,047	1,076	1,050
Portugal	426	327	470	395	502	534	394	605	268	400
Spain	4,410	4,268	6,052	5,329	4,392	5,768	6,173	5,200	4,700	5,100
United Kingdom	10,320	10,802	14,957	12,045	13,910	11,940	11,750	14,030	14,100	14,300
EC-12	*67,399*	*67,339*	*87,041*	*75,563*	*76,230*	*75,488*	*78,376*	*82,037*	*84,837*	*88,830*

July 1991

Production Estimates and Crop Assessment Division, FAS, USDA

WORLD COTTON PRODUCTION OUTLOOK FOR 1991/92

World cotton production for 1991/92 is projected to rise 4 percent to a record 90.3 million 480-pound bales. Foreign production is predicted at 74.1 million bales with foreign harvested cotton area at 29.4 million hectares, second only to the 1984/85 record of 76.0 million bales and 29.7 million hectares. The 1991/92 record world production forecast is supported by this planting season's higher cotton prices relative to last season, continued strong demand, and central government support for increased cotton output in many countries.

Production in China for 1991/92 is estimated at 22.5 million bales, up 1.8 million bales from the 1990/91 level. Last year, China produced an estimated 20.7 million bales, the highest since its record crop of nearly 29.0 million bales in 1984/85. The government is pressing for increased output to allow China to become a consistent exporter of raw cotton and a major exporter of textiles while meeting its rapidly rising domestic consumption requirements. High fixed government cotton procurement prices have attracted land away from corn which is depressed by lower prices following a record 1990/91 corn crop. Production policies for 1991/92 call for continuation of attractive prices and subsidization of inputs at 1990/91 levels. In addition, several major cotton producing provinces have indicated that they also will maintain supplemental subsidies at the same level as offered last year. Available input supplies for this year's crop are expected to remain largely unchanged from 1990/91.

Production in the United States for 1991/92 is projected at 16.2 million bales, up 5 percent from last year and the largest crop since 1953/54 when output reached 16.4 million bales. Due to late planting and/or replanting in some areas, cotton development is behind the normal seasonal pace and behind last year but conditions have improved. Planted area is 15 percent above last year.

Cotton production in the Soviet Union for 1991/92 is projected at 11.5 million bales, down 0.5 million bales from 1990/91. The area under cultivation continues to decrease as Central Asian republics attempt to diversify their crops. A lack of feed and produce production in Central Asia has prompted a reduction in cotton plantings to devote more area to food and forage crops. Ecological considerations including soil salinization, loss of soil fertility, and depletion of scarce water resources also have prompted a shift away from cotton.

In South Asia, cotton production is projected to push above 1990/91 with growth occurring mostly in Pakistan and India. For the 1991/92 season, Pakistani cotton production is expected to set a new record at 7.8 million 480-pound bales. Growth is being influenced by this year's higher cotton prices along with a continued strong domestic demand from the expanding textile industry. For 1991/92, seed and fertilizer supplies are good. Area expansion has been constrained by a lack of available land in the major cotton producing region. In India, output for 1991/92 is projected at 10.0 million bales, well above the 9.2 million bales produced last year but below the record 10.5 million-bale crop set in 1989/90. The domestic cotton situation is tight and prices have remained high. Both conditions bode well for higher output this year. In Australia, production for 1991/92 is expected to be almost as large as the 1990/91 crop if cotton prices remain strong as planting time nears in September-October and if sufficient soil moisture is available to maintain the 1990 level of dryland seeding.

In Mexico, cotton production for 1991/92 is anticipated to rebound to 1.0 million bales following two consecutive less-than-optimum crop years. The expected output increase is due to high reservoir levels and cropping alternatives that currently favor cotton. In Central America, production is projected to rise moderately to 0.3 million bales in 1991/92 because of attractive cotton prices. South American cotton output for 1991/92, with farming operations soon to begin could increase by about 10 percent over 1990/91. However, the forecast of higher output is based on expectations of a more timely release of government-supplied production financing than occurred at the outset of 1990/91. The 1991/92 Brazilian cotton crop currently is forecast at 3.5 million bales, 13 percent above 1990/91. Most of the projected growth is based on a recovery in yields as area is estimated only slightly larger than last year. In Argentina, the second largest producer in South America, production for 1991/92 is expected to decline slightly to 1.3 million bales, 2 percent below last year. Planted area is expected to be down due to farmers' tight financial situation.

In Turkey, cotton production for 1991/92 is projected at 2.5 million bales, down 11 percent from last season. The slippage in production is reflected in farmers' switch to other crops as the government excludes cotton from support programs. In addition, unsuitable planting weather in June has further placed cotton output at risk. In early June, cotton planting still was continuing as rain in all cotton producing districts had slowed sowings and necessitated some replanting. This situation likely will delay maturity and increase the risk of rain damage during harvest.

Egypt is expected to produce 1.3 million bales for 1991/92, down 6 percent from last year. The drop in output is the result of weak and unclear producer incentives including low procurement prices. Planted area for 1991/92 is estimated down from last year, mainly in response to a new government policy to remove marginal land from the cotton rotation.

For the African 'Franc Zone' countries, 1991/92 cotton production is forecast at 2.6 million bales, up 7 percent from last season. Many of the countries in this group depend heavily on cotton exports for foreign exchange earnings. Because of this need, there is strong governmental support for the cotton sector in the form of subsidized inputs. This is particularly true for Cote d'Ivoire, Mali, Benin, Cameroon, and Burkina. The largest percentage increase is projected to occur in Cote d'Ivoire, up 19 percent to 0.6 million bales. The increase is due to expanded area, favorable rains at planting, and continued improvement in yields.

Ronald R. Roberson (202) 382-8879

TABLE 11

1991/92 Forecast of World Cotton Production

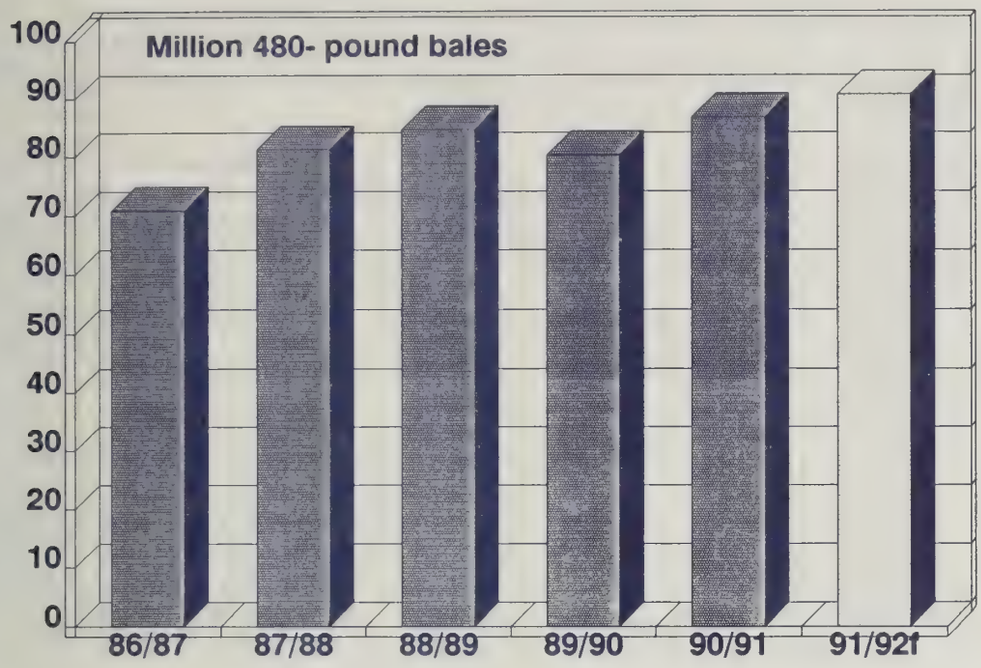

TABLE 12

WORLD COTTON AREA, YIELD, AND PRODUCTION			
Year	Harvested Area (1,000 Ha)	Yield (Kg/Ha)	Production (1,000 480-Bales)
1981/82	32,977	468	70,886
1982/83	31,393	472	68,035
1983/84	30,838	465	65,854
1984/85	33,859	571	88,757
1985/86	31,670	553	80,431
1986/87	29,492	521	70,567
1987/88	31,021	569	81,008
1988/89	33,701	547	84,661
1989/90	31,550	552	80,004
Prel. 1990/91	33,294	566	86,618
5-Year Avg.	31,487	549	79,334
Forecast 1991/92			90,326

PRODUCTION OF TOMATOES FOR PROCESSING IN SELECTED COUNTRIES

Output of tomatoes for processing in 11 major producing countries is estimated at 19.2 million tons for 1991, down 3 percent from the 1990 level. Preliminary data indicate the 1991 area harvested in the 11 countries also will be down about 3 percent compared to 1990. The decrease in area mainly is occurring in the EC. Production of processing tomatoes in the Mediterranean Basin (listed EC countries plus Turkey and Israel) is forecast to decline sharply in 1991 due to lower output in all countries except Greece.

In the United States, production under contract is forecast at 10.0 million tons, 6 percent above the total production in 1990. Area planted under contract is up slightly and improved yields are anticipated. Canadian output of processing tomatoes is expected to be down in 1991 as financial difficulties on the part of processors has reduced contracting. Mexico's elimination in July 1988 of the quota system on tomato plantings and stronger prices for tomato products induced a significant production increase in both 1989 and 1990. Area planted for the 1991 crop (harvested February-May 1991) is estimated to have expanded about 10 percent.

Output of processing tomatoes in the 5 EC countries listed is estimated at 6.7 million tons, 10 percent below 1990. The crop is forecast to be down due to unfavorable spring weather in several major growing areas and less favorable prospects for profitable over-quota production. EC support prices in ECU terms are unchanged from 1990, but due to currency realignments, producers in some countries are receiving support price increases. The overall EC quota is up 200,000 tons, with Spain and Portugal each getting half the increase.

Output in Italy, the leading EC producer, is forecast at 3.4 million tons, down sharply from 1990 largely due to unfavorable spring weather. Processing tomato production in Greece for 1991 is forecast up from last year's drought-reduced output. Area planted is estimated to be up slightly as prices for alternative crops are less favorable than those of tomatoes. Spain's production of processing tomatoes for 1991, estimated at 1.1 million tons, is 7 percent below the 1990 crop due to the stock build-up in the product sector. That build-up has hurt prospects for profitable over-quota production. Though production is forecast to decline, it is still adequate to fulfill Spain's EC quota. Output of processing tomatoes in Portugal, estimated at 702,000 tons, is forecast down 15 percent from last year's record. Processors are burdened with unsold stocks and are less likely to buy over-quota production. French output of processing tomatoes is forecast down in 1991 as producers are feeling the impact of more competitively priced imports.

Turkey's output of commercial processing tomatoes is estimated at 1.3 million tons in 1991, down 130,000 from the 1990 level and 380,000 off the 1989 record. Unfavorable price relationships are the reason that output continues to slide. Israel's 1991 output is forecast at 120,000 tons, less than one-third of the 1990 level. A severe shortage of irrigation water is causing the decline.

Taiwan's 1991 output of processing tomatoes (harvested December 1990 - April 1991) is forecast at 185,000 tons, up slightly from the 1990 figure. Final yield estimates are expected to be above last year's levels which were depressed by typhoon damage.

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TABLE 13

PRODUCTION OF TOMATOES FOR PROCESSING IN SELECTED COUNTRIES
(1,000 Tons)

Country	1989	1990	Forecast 1991
United States	8,604	9,394	9,966 1/
Canada	539	580	500
Mexico	317	365	400
Italy	3,800	4,000	3,400
France	324	326	320
Greece	1,400 2/	1,150 3/	1,250
Spain	976	1,134	1,055
Portugal	611	824	702
Turkey	1,700	1,450	1,320
Israel	329	370	120
Taiwan	220	182	185
Total	18,820	19,775	19,218

1/ Contract production only.
2/ Includes 8,000 tons withdrawn from the market and approximately 100,000 tons not delivered to processors.
3/ Includes approximately 80,000 tons diverted to the fresh market.

JULY 1991 Production Estimates and Crop Assessment Division

Israeli Oilseed Production

Total 1991 oilseed production in Israel is estimated at 72,000 metric tons, down 43,000 tons or 37 percent from last year and down 145,000 from the record crop of 1984. Harvested area and production have been declining since the early 1980's. Yields have shown much less variation than harvested area during the past decade.

COTTONSEED

Israeli 1991 cottonseed production is estimated at 35,000 tons, down 58 percent from last year's crop. The area planted to cotton has been declining throughout the 1980's as a result of a combination of lower lint prices and scarce water. The lack of precipitation in the last few years has created a severe water crisis in Israel and led to a drastic reduction of irrigation water. This will reduce the estimated area under cotton in 1991 by 61 percent to 12,000 hectares, down from last year's 31,000.

Yields may remain high despite the drought. Lint quality can be expected to increase if there is no rain during the picking season and because the entire crop is irrigated. A reason for the previous two years of high yields is thought to be the elimination of marginal areas following the sharp area reduction. Robust yields for the 1991 crop may be expected based on this premise but will ultimately depend on how accurately farmers gauge planted area relative to available irrigation water.

The area devoted to Acala and Pima cotton is driven by lint prices and expected yields of these types. Acala cotton is expected to comprise about 65 percent of the 1991 area, similar to the previous growing season. Those farmers not growing cotton in 1991 are likely to shift to sunflower because of its relatively low demand for water and the growing export market. The reduction in cotton area may require further reorganization of ginning facilities.

Cottonseed is the only non-imported oilseed used in the vegetable oil industry. About 75 percent of the cottonseed produced is used for cattle feed. The expected decline in cotton area in 1991 may eliminate the use of domestically grown cottonseed in the vegetable oil industry.

In recent years, the government has had no policy for cotton production. The Ministry of Finance advocated a reduction and even elimination of cotton due to its high water consumption and low world prices during the late 1980's. The Ministry of Agriculture however recommended maintaining an area of about 30,000 hectares but because of scarce water, cotton area is expected to be about a third of the recommended amount.

PEANUTS

Production of peanuts is estimated at 20,000 tons, unchanged from the previous two years, down 1,000 tons from the 5-year average, and down 10,000 from the bumper crop of 1981. Harvested area has been declining steadily while yields have been increasing during the past decade. The area decline is due to lower profitability and exports. Area for 1991 is expected to be about 3,000 hectares, similar to last year. Yields for last year were good, based on the favorable weather, and similar yields are estimated for the 1991 crop.

Peanuts grown in Israel are for confectionery uses, rather than crushing. They are exported in the shell or processed and incorporated into confectionery products for both local and export consumption.

Though the growing season for peanuts closely follows that of cotton, the water shortage is not expected to affect this crop as severely because it is an export crop and therefore not subject to import crops' 80-percent water reduction. The government has no production policy for peanuts.

SUNFLOWERSEED

Israeli sunflower production is estimated at 17,000 metric tons, up 5,000 tons from the previous year and up 7,000 tons from the 5-year average. Production has varied in the past decade, yet there is little difference between the 5- and 10-year production averages. Although harvested area has been declining in the previous 10 years, the 1991 area is 350 percent greater than in 1990 due to the sowing of area that was formerly devoted to cotton and the growing export markets. Yields generally have increased during the past 10 years.

Like peanuts, sunflowerseed grown in Israel is exclusively for the confectionery market. The common variety has low oil content, a large kernel, and was developed specifically for confectionery use. Sunflowers are relatively insensitive to water quality and those grown in Israel are not irrigated.

BACKGROUND

In the oilseed industry liberalization of 1988, production and seed import cartels were dissolved and oilseed price controls were removed. Equalization levies were imposed on imported oils and oil meal imports. The latter also were subject to quotas. This was to facilitate reorganization of the oil industry, which many felt was too large and inefficient. The former seven plants have been amalgamated into five crushing operations as a result.

Government production policy has a minimal effect on oilseed production. However, reductions in water allocations in 1991 coupled with the severe depletion of water resources will likely have a major effect on cottonseed. Rapeseed production is under experimentation in Israel but faces the problems of being a short photoperiod crop and sensitive to broad leaf weeds. Because of this and the expansion of sunflowerseed export markets, sunflowerseed is expected to become the substitute crop for cottonseed.

Serious water shortages in Israel have resulted in the decision to sharply reduce water allocation to agriculture and to raise the price of water to farmers. The measures were developed and instituted in early 1991 and are expected to be in force for at least 2 years. Water for import crops (field crops including grains and oilseeds) will be cut 80 percent from last year. Tree crops will receive a 40 percent or greater reduction but greenhouses and field vegetables are exempt. These reductions are in addition to a 10-percent reduction 4 years ago and a 12-percent reduction in 1990. Industrial crops such as cotton will receive only brackish or recycled water, though quantities will not be limited. Water prices have risen 160 percent from last year, and could increase further.

Water quality also is affected. Of the 1.25 billion gallons available for agriculture in 1990, 300 million were brackish. For 1991, almost 500 million of 800 million available will be brackish. The resulting increase in soil salinity will require expensive treatment and continued research to develop saline tolerant crops. The cost of restructuring for some growers could prove to be too high and force those who are already heavily indebted out of business.

Agricultural production is likely to be restructured toward high yielding greenhouse crops. The Ministry of Agriculture expects short-term production of grain, cotton, and fruit crops to fall sharply. New varieties now under development are expected to boost overall production to current levels in approximately 3 years.

Jay Kress (202) 475-5142

This article is based on reports by the staff of the USDA agricultural counselor's office, Athens, Greece, and agricultural specialist's office, Tel Aviv.

TABLE 14

Israeli Oilseeds: Harvested Area, Yield, and Production

	Area (1000 Ha)	Yield (MT/Ha)	Production (1000 Tons)
Cottonseed			
1981/82	62	2.34	145
1982/83	56	2.73	153
1983/84	57	3.28	187
1984/85	63	2.94	185
1985/86	65	2.46	160
1986/87	46	2.67	123
1987/88	40	2.43	97
1988/89	48	2.17	104
1989/90	30	2.53	76
1990/91	31	2.68	83
1991/92 July	12	2.92	35
1987-91 Average	39	2.48	97
Peanut			
1981/82	7	4.29	30
1982/83	5	4.40	22
1983/84	5	4.40	22
1984/85	5	4.40	22
1985/86	5	4.60	23
1986/87	5	4.60	23
1987/88	5	4.20	21
1988/89	4	4.75	19
1989/90	4	5.00	20
1990/91	3	6.67	20
1991/92 July	3	6.67	20
1987-91 Average	4	4.90	21
Sunflowerseed			
1981/82	8	1.00	8
1982/83	9	1.00	9
1983/84	6	0.83	5
1984/85	5	2.00	10
1985/86	6	1.67	10
1986/87	6	1.50	9
1987/88	6	1.17	7
1988/89	6	1.17	7
1989/90	9	1.89	17
1990/91	4	3.00	12
1991/92 July	14	1.21	17
1987-91 Average	6	1.68	10
Total Oilseeds			
1981/82	77	2.38	183
1982/83	70	2.63	184
1983/84	68	3.15	214
1984/85	73	2.97	217
1985/86	76	2.54	193
1986/87	57	2.72	155
1987/88	51	2.45	125
1988/89	58	2.24	130
1989/90	43	2.63	113
1990/91	38	3.03	115
1991/92 July	29	2.48	72
1987-91 Average	49	2.58	128

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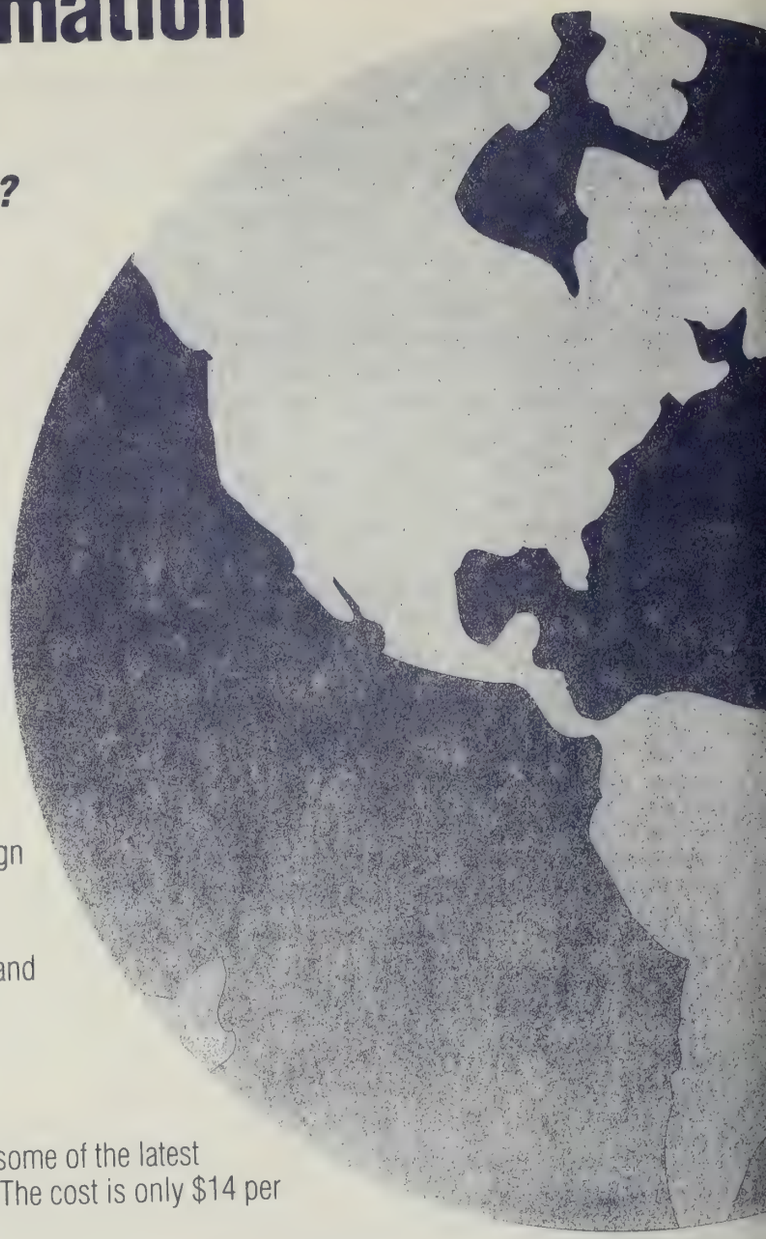

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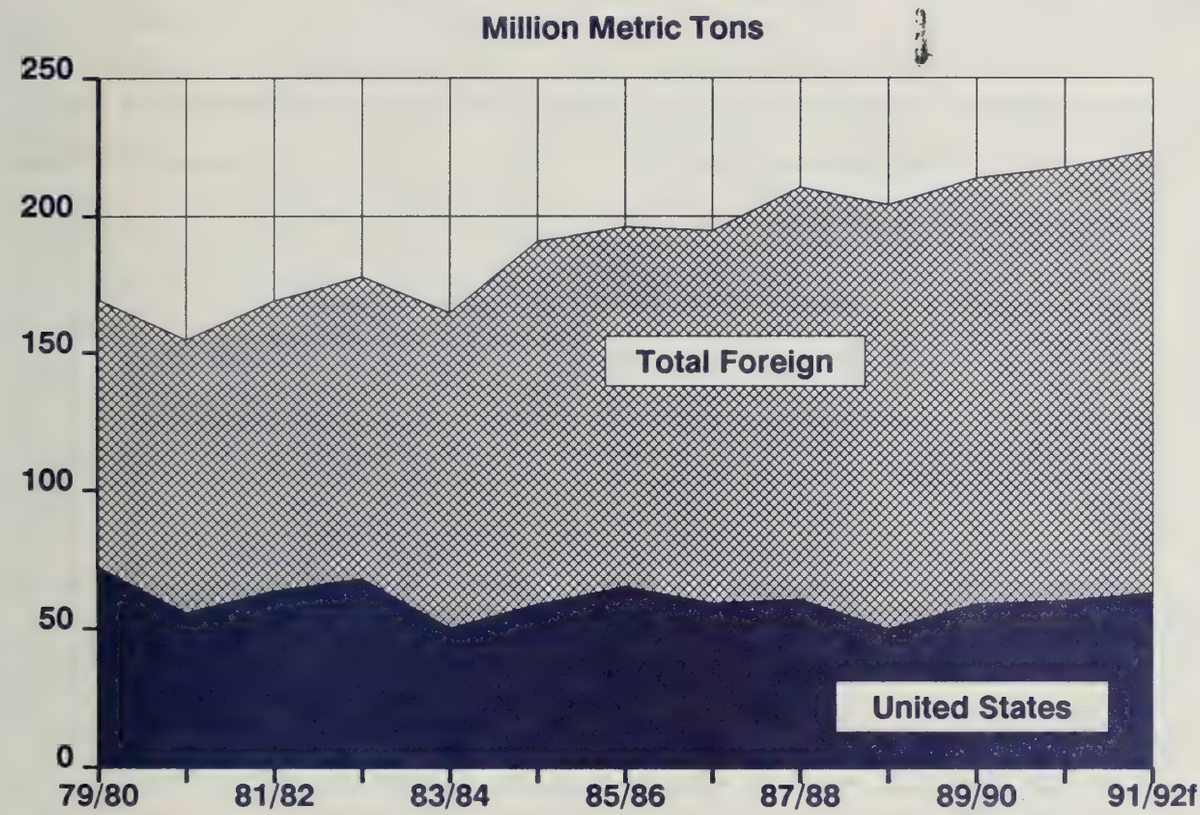
World Oilseeds Production



Production Articles This Month...

- World Oilseeds
- EC Oilseeds
- World Poultry
- Chinese Cotton
- Canadian Wheat and Rapeseed

Approved by the World Agricultural Outlook Board - USDA

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-257), August 12, 1991.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 382-8888 or by FAX (202) 447-7729.

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* The next issue of World Agricultural Production will be released at 3 p.m. *
* eastern time on September 13, 1991. *
****

CONVERSION TABLE

Metric Tons to Bushels		Metric Tons to 480-lb. Bales	
		Cotton	= MT*4.592917
Wheat & Soybeans	= MT*36.7437		
Corn, Sorghum, Rye	= MT*39.36825		
Barley	= MT*45.929625		
Oats	= MT*68.894438	Metric Tons to Hundredweight	
		Rice	=MT*22.04622
1 hectare	= 2.471044 acres		
1 kilogram	= 2.204622 pounds		

NOTE: BEGINNING WITH THE MAY EDITION, THIS CIRCULAR SERIES COMBINES DATA FOR THE TERRITORIES FORMERLY KNOWN AS EAST GERMANY (GDR) AND WEST GERMANY (FRG) UNDER THE HEADING GERMANY. LIKEWISE, DATA FOR THE TERRITORY FORMERLY CALLED EAST GERMANY (GDR) ARE INCLUDED IN AGGREGATES FOR THE EUROPEAN COMMUNITY (EC-12) AND EXCLUDED FROM AGGREGATES FOR EASTERN EUROPE. BECAUSE OF THIS, DATA FOR "GERMANY", EASTERN EUROPE, AND THE EUROPEAN COMMUNITY (EC-12) ARE NOT COMPARABLE WITH DATA PUBLISHED IN PRIOR EDITIONS OF THIS CIRCULAR SERIES AND MAY NOT BE COMPARABLE WITH SUCH ESTIMATES FOUND IN OTHER PUBLICATIONS OF THE U.S. DEPARTMENT OF AGRICULTURE.

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PRODUCTION HIGHLIGHTS FOR 1991/92

August 1991

WHEAT: World production for 1991/92 is estimated at 550.5 million tons, down 5.6 million or 1 percent from last month, and down 7 percent from last year. Total foreign production is estimated at 495.2 million tons, down 5.7 million or 1 percent from last month and down 4 percent from last year. Country highlights are as follows:

- **United States** — Production is forecast at 55.3 million tons, virtually unchanged from last month, but down 26 percent from last year.

- **Soviet Union** — Production is projected at 85.5 million tons, down 6.5 million or 7 percent from last month, and down 21 percent from last year. Conditions remain unfavorable for much of the spring grains areas and harvest reports indicate lower-than-expected winter grain yields.

- **China** — Production is projected at 94 million tons, down 1.0 million or 1 percent from last month, and down 4 percent from last year. Although many provinces in the North China Plain reported record or near-record winter wheat output, total production is expected to decline because of severe flooding in central China and lower planted area to spring wheat.

- **Argentina** — Production is projected at 9.0 million tons, down 1.0 million tons or 10 percent from last month, and down 18 percent from 1990/91. Estimated area was reduced by 17 percent from last month's level due to planting delays and low prices.

- **Brazil** — Production is projected at 3.2 million tons, down 0.8 million or 20 percent from last month, but unchanged from 1990/91. Planting of the 1991/92 crop is nearly complete, and indications are that planted area is down significantly from last year. In addition to the reduced area, cash-strapped farmers have lowered input use which may affect yields.

- **Canada** — Production is projected at 31.0 million tons, up 2.0 million or 7 percent from last month, but down 2 percent from last year's record harvest. Widespread favorable weather throughout the growing season increased yield potential.

- **Iran** — Production is projected at 7.1 million tons, up 0.7 million or 11 percent from last month, and up 1 percent from last year. The increase is attributed to higher estimated yield.

- **Eastern Europe** — Production is projected at 39.4 million tons, up 0.4 million or 1 percent from last month, but down 4 percent from last year's record harvest. Higher guaranteed prices in Yugoslavia resulted in increased area and input usage.

- **EC-12** — Production is projected at 89.0 million tons, up 0.2 million or marginally from last month and up 5 percent from last year. Favorable weather in the United Kingdom increased yield prospects.

- **Tunisia** — Production is projected at 1.5 million tons, up 0.2 million or 17 percent from last month, and up 35 percent from 1990/91. Increased durum planted area and record estimated yields due to favorable weather are the reasons for the increase.

COARSE GRAINS: World production for 1991/92 is estimated at 798.6 million tons, down 29.4 million or 4 percent from last month, and down 3 percent from last year. Total foreign production is estimated at 581.6 million tons, down 5.5 million or 1 percent from last month, and down 3 percent from last year. Country highlights are as follows:

- **United States** — Production is forecast at 217.1 million tons, down 23.9 million or 10 percent from last month, and down 6 percent from last year. Unfavorable weather conditions reduced forecast yields for corn, sorghum, and oats.

- **Soviet Union** — Production is projected at 91.5 million tons, down 8 million or 8 percent from last month, and down 19 percent from last year. Hot, dry conditions in the spring grains areas reduced prospects for coarse grains. Also, corn area was adjusted downward and continued dryness in the European USSR will likely reduce yields.

- **India** — Production is projected at 32.5 million tons, down 0.5 million or 2 percent from last month, and 7 percent below last year's record harvest. Deficient rainfall in key rainfed growing regions of north India have significantly decreased corn area and yield prospects. Millet yields also are forecast to decline because of a lack of timely rainfall and heat stress. Sorghum yields are forecast higher due to excellent moisture conditions in central India.

- **Canada** — Production is projected at 25.9 million tons, up 1.5 million or 6 percent from last month, but down 3 percent from last year. Favorable weather throughout the growing season increased yield potential for barley.

- **Mexico** — Production is projected at 16.8 million tons, up 0.8 million or 5 percent from last month, but down 8 percent from last year's record. Increased corn production prospects account for the largest change. Beneficial rains in the corn belt have led to increased yield potential.

- **Iran** — Production is projected at 2.6 million tons, up 0.4 million or 18 percent from last month, but down 1 percent from last year. The increase is due to a higher estimated barley yield.

RICE (MILLED-BASIS): World production for 1991/92 is projected at 344.3 million tons, virtually unchanged from last month but down 1 percent from last year's record crop. Total foreign production in 1991/92 is projected at 339.3 million tons, also virtually unchanged from last month but down 1 percent from 1990/91. Country highlights are as follows:

- **United States** — Production is forecast at 5.0 million tons, down marginally from last month and down 3 percent from last year.

- **Bangladesh** — Production is projected at a record 18.4 million tons, up 0.4 million or 2 percent from last month, and up 3 percent from last year's record harvest. Recent heavy rains have probably increased irrigation reserves and raised prospective yields in the fall harvested Amam rice crop.

OILSEEDS: Total world oilseeds production during 1991/92 is forecast at a record 220.8 million tons, down 3.0 million or 1 percent from last month, but up 2 percent from 1990/91. Foreign production during 1991/92 is forecast to be a record 159.7 million tons, down 0.9 million or 1 percent from last month, but up 2 percent from last year. Total oilseed production in the United States is forecast at 61.1 million tons, down 2.1 million or 3 percent from last month, but up 1 percent from last year.

* **Soybeans:** World production for 1991/92 is forecast at 104.2 million tons, down 2.8 million or 3 percent from last month, but up 1 percent from last year. Total foreign soybean output is forecast at 53.4 million tons, down slightly from last month, but up 4 percent from 1990/91. Country highlights are as follows:

  - **United States** — Production is estimated at 50.9 million tons, down 2.8 million or 5 percent from last month and down 3 percent from last year. The National Agricultural Statistics Service, USDA, reduced yield projections from last month, but held expected harvested area at 23.8 million hectares, up 0.9 million from 1990/91.

* **Cottonseed:** World production for 1991/92 is forecast at 34.9 million tons, down 0.2 million or 1 percent from last month, but up 4 percent from last year. Total foreign production is forecast at 26.7 million tons, down 0.6 million or 2 percent from last month, but up 2 percent from last year. Country highlights are as follows:

  - **United States** Production is estimated at 6.2 million tons, up 0.4 million or 7 percent from last month and up 14 percent from 1990/91. Official estimates by the National Agricultural Statistics Service this month increased expected average yield and pegged harvested area at 5.4 million hectares, up 0.6 million from last year.

  - **China** Production is estimated at 8.2 million tons, down 0.3 million or 4 percent from last month, but up 7 percent from last year. Summer floods in the Yangtze River Valley reduced estimated harvested area and yield. China's production is expected to be higher than last year however, as total area is still above last season.

  - **Soviet Union** Production is estimated at 4.6 million tons, down 0.3 million or 7 percent from last month, and down 7 percent from 1990/91. Excessive moisture conditions have reduced harvested area and yield expectations.

* **Peanuts:** World production for 1991/92 is forecast at 22.7 million tons, up 0.2 million or 1 percent from last month, and up nearly 3 percent from 1990/91. Total foreign production is forecast at 20.4 million tons, unchanged from last month, but down less than 1 percent from last year. Country highlights are as follows:

  - **United States** Production is estimated at a record 2.3 million tons, up 0.2 million or 8 percent from last month, and up 42 percent from 1990/91. The National Agricultural Statistics Service expects average yield to recover from last year's level and pegs harvested area at 795,000 hectares, up nearly 9 percent from 1990/91.

* **Sunflowerseed:** World production for 1991/92 is forecast at 21.4 million tons, down 0.2 million or 1 percent from last month, and down 3 percent from 1990/91. Total foreign production is forecast at 19.9 million tons, down 0.2 million or 1 percent from last month, and down 5 percent from last year. Country highlights are as follows:

  - **United States** Production is estimated at 1.5 million tons, up 25,000 tons or nearly 2 percent from last month, and up 49 percent from last year. Slightly higher yield estimates this month are based on favorable growing conditions to date. Harvested area is estimated at 1,025 thousand hectares, up 37 percent from 1990/91.

- o **Soviet Union** Production is estimated at 6.6 million tons, down 0.2 million or 3 percent from last month, but up slightly from last year. Dry conditions have stressed plants in some growing regions, reducing estimated harvested area and average yield.

* **Rapeseed:** World production for 1991/92 is forecast at a record 27.1 million tons, unchanged from last month, but up 5 percent from last year. Total foreign production is forecast at 27.0 million tons, unchanged from last month, but up 5 percent from last year. There were no changes this month.

  - o **United States** Production is estimated at 105,000 tons, unchanged from last month, but nearly double that of last year. Area and production data for 1987/88 through the initial 1991/92 estimate, are estimates from the Interagency Oilseeds Committee and the World Agricultural Outlook Board. The National Agricultural Statistics Service, USDA, is expected to announce its U.S. rapeseed area estimates in January 1992.

* **Flaxseed:** World production for 1991/92 is forecast at 2.1 million tons, unchanged from last month, but down 0.2 million or 10 percent from last year. While production in the United States is small, this year's output is expected to increase by 18 percent over last year, to 114,000 tons. Total foreign production is pegged at 2.0 million tons, down 0.3 million or 11 percent from last year. There were no changes this month.

* **Copra:** World production for 1991/92 is forecast at 4.8 million tons, unchanged from last month, but down 165,000 tons or 3 percent from last year. Copra production reached a record 5.3 million in 1985/86. There were no changes this month.

* **Palm Kernels:** World production for 1991/92 is forecast at a record 3.6 million tons, unchanged from last month, but up 7 percent from last year. There were no changes this month.

* **Palm Oil:** World production for 1991/92 is forecast at a record 11.9 million tons, up slightly from last month and up 8 percent from last year. There were no significant changes this month.

COTTON: World cotton production in 1991/92 is projected at a record 91.1 million bales. This estimate is up 0.8 million bales or 1 percent from last month and up 4.4 million bales or 5 percent from 1990/91 and up from the previous record of 89 million bales harvested in 1984/85. Total foreign production is projected at 73.5 million bales, down 0.7 million bales or 1 percent from last month but is a gain of 3 percent over 1990/91 and second only to the 1984/85 record crop of 76 million bales. Country highlights are as follows:

- **United States** — Production is estimated at 17.6 million bales, up 1.4 million bales or 9 percent from last month, and 14 percent above last year. If realized, this will be the largest crop since 1937/38 when output hit 18.9 million bales. The production increase reflects this year's larger area estimate of 5.4 million hectares, well above the 4.7 million hectares of 1990/91.

- **China** — Production is estimated at 22.0 million bales, down 0.5 million or 2 percent from last month, but up 6 percent from last year. Area and yield were reduced this month due to severe flooding in the Yangtze River valley, but production in 1991/92 is still expected to be higher than last year because of an estimated 400,000 hectare increase in area.

- **USSR** — Production is estimated at 11.3 million bales, down 0.2 million bales or 2 percent from last month, and down 6 percent from last year. Overall, conditions have been normal, except for wet weather in minor producing areas. However, lack of quality seeds and other inputs and antiquated irrigation equipment have been reported.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	1991/92	1989/90	1990/91	July	Aug.	1989/90	1990/91	July	Aug.
	--Million Acres--			--Million Acres--			--Bushels per Acre--				--Million Bushels--			
All Wheat	76.6	77.3	70.0	62.2	69.4	58.1	32.7	39.5	35.0	35.0	2,037	2,739	2,032	2,033
Winter	55.1	57.0	51.0	41.5	50.0	39.5	35.0	40.7	34.4	34.7	1,455	2,033	1,361	1,372
Other	21.5	20.3	19.0	20.7	19.4	18.6	28.1	36.4	36.2	35.6	582	705	671	661
Rye	2.0	1.6	1.7	0.5	0.4	0.4	28.2	23.3	27.6	27.6	14	10	12	12
Soybeans	60.8	57.8	59.8	59.5	56.5	58.7	32.3	34.0		31.8	1,924	1,922	1,970	1,869
Corn	72.2	74.2	75.9	64.7	67.0	68.8	116.3	118.5		107.8	7,525	7,933	8,275	7,418
Sorghum	12.6	10.5	11.0	11.1	9.1	9.7	55.4	62.9		57.9	615	571	630	565
Barley	9.1	8.2	8.9	8.3	7.5	8.4	48.6	55.9	56.5	55.8	404	419	476	470
Oats	12.1	10.4	8.6	6.9	5.9	5.0	54.3	60.1	56.3	52.2	374	357	280	260
							--Pounds per Acre--				--Million CWT--			
Rice	2.7	2.9	2.9	2.7	2.8	2.8	5,749	5,507		5,544	154.5	154.9	157.5	157.0
											--Million 480-Pound--			
All Cotton	10.6	12.3	14.1	9.5	11.7	13.4	614	634		630	12.2	15.5	16.2	17.6

1/ Except for estimated rye production, all estimates are from the USDA National Agricultural Statistics Service (NASS) for 1989/90, 1990/91 and 1991/92. Production and yield estimates for rye are from the USDA Interagency Commodity Estimates Committee.

AUGUST 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			USSR	Asia					South America		Selected Other			All Other Countries
			United States	Canada	Mexico	EC-12	Oth. W. Europe	Eastern Europe		China	India	Indo-nesia	Paki-stan	Thai-land	Argen-tina	Brazil	Aus-tralia	South Africa	Turkey	
	—Million Metric Tons—																			
Wheat																				
1989/90	537.6	482.2	55.4	24.6	4.0	82.0	4.4	40.7	92.3	90.8	54.1	0.0	14.4	0.0	10.2	5.6	14.2	2.0	12.5	15.4
1990/91 prel.	593.0	518.4	74.5	31.7	3.9	84.7	5.1	41.1	108.0	98.0	49.7	0.0	14.3	0.0	11.0	3.2	15.4	1.7	15.0	17.8
1991/92 proj.																				
July	556.1	500.8	55.3	29.0	3.5	88.8	4.1	39.0	92.0	95.0	54.0	0.0	14.5	0.0	10.0	4.0	12.0	2.0	16.0	17.6
August	550.5	495.2	55.3	31.0	3.5	89.0	4.1	39.4	85.5	94.0	54.0	0.0	14.5	0.0	9.0	3.2	12.0	2.0	16.0	17.7
Coarse Grains																				
1989/90	800.0	578.6	221.4	23.5	14.1	89.6	12.4	60.2	104.8	93.5	34.6	5.0	2.7	4.3	8.3	22.5	6.8	9.5	7.5	79.3
1990/91 prel.	827.3	596.7	230.6	26.8	18.4	84.1	13.6	52.3	113.3	106.0	35.0	5.3	2.9	4.0	11.2	24.2	6.9	7.6	8.9	76.4
1991/92 proj.																				
July	828.0	587.1	240.9	24.4	16.0	89.5	12.2	58.0	99.5	99.4	33.0	5.6	2.4	4.1	10.1	26.7	7.4	8.6	9.7	80.5
August	798.6	581.6	217.1	25.9	16.8	89.5	12.2	58.0	91.5	99.4	32.5	5.6	2.4	4.1	10.1	26.7	7.4	8.6	9.7	81.1
Rice (Milled)																				
1989/90	344.0	338.9	5.1	0.0	0.4	1.4	0.0	0.1	1.7	126.1	74.1	29.1	3.2	13.3	0.2	4.9	0.7	0.0	0.2	23.2
1990/91	348.3	343.2	5.1	0.0	0.2	1.6	0.0	0.1	1.6	129.5	75.0	29.4	3.1	11.4	0.2	6.3	0.5	0.0	0.2	23.7
1991/92																				
July	344.2	339.2	5.0	0.0	0.3	1.5	0.0	0.1	1.7	126.0	73.0	29.0	3.2	13.2	0.2	6.8	0.6	0.0	0.2	23.4
August	344.2	339.3	5.0	0.0	0.2	1.5	0.0	0.1	1.7	126.0	73.0	28.9	3.2	13.2	0.2	6.8	0.6	0.0	0.2	23.2
Total Grains 1/																				
1989/90	1,681.7	1,399.8	281.9	48.0	18.5	173.0	16.8	101.0	198.8	310.4	162.7	34.1	20.4	17.6	18.7	33.0	21.7	11.5	20.2	193.4
1990/91 prel.	1,768.6	1,458.4	310.2	58.5	22.5	170.4	18.7	93.5	222.9	333.5	159.6	34.7	20.3	15.4	22.5	33.7	22.9	9.3	24.1	196.1
1991/92 proj.																				
July	1,728.4	1,427.2	301.2	53.4	19.8	179.8	16.3	97.2	193.2	320.4	160.0	34.6	20.1	17.3	20.3	37.5	20.0	10.6	25.9	200.8
August	1,693.4	1,416.0	277.4	56.9	20.5	180.0	16.3	97.6	178.7	319.4	159.5	34.5	20.1	17.3	19.3	36.7	20.0	10.6	25.9	202.7
Oilseeds 2/																				
1989/90	214.0	154.7	59.3	4.9	1.4	11.5	0.7	5.2	13.8	28.5	19.3	2.2	3.3	0.9	15.8	21.8	0.7	1.0	2.3	21.5
1990/91 prel.	217.4	156.9	60.5	5.6	1.0	13.0	0.7	4.3	13.0	33.6	20.4	2.2	3.6	0.7	16.1	17.0	2.0	1.0	1.9	20.5
1991/92 proj.																				
July	223.8	160.5	63.2	6.3	1.1	13.2	0.7	4.2	13.4	34.1	20.2	2.3	3.8	0.7	15.6	19.1	1.0	1.0	1.6	22.3
August	220.8	159.7	61.1	6.3	1.1	13.2	0.7	4.2	12.9	33.7	20.2	2.3	3.8	0.7	15.6	19.1	1.0	1.0	1.6	22.3
	—Million 480-Pound Bales—																			
Cotton																				
1989/90	80.0	67.8	12.2	0.0	0.8	1.5	0.0	0.1	12.3	17.4	10.6	0.0	6.7	0.1	1.3	3.0	1.4	0.3	2.8	9.5
1990/91 prel.	86.7	71.2	15.5	0.0	0.8	1.4	0.0	0.1	12.0	20.7	9.2	0.0	7.5	0.1	1.3	3.1	1.8	0.2	2.9	10.2
1991/92 proj.																				
July	90.3	74.1	16.2	0.0	1.0	1.3	0.0	0.1	11.5	22.5	10.0	0.0	7.8	0.2	1.3	3.5	1.7	0.3	2.5	10.4
August	91.1	73.5	17.6	0.0	1.0	1.3	0.0	0.1	11.3	22.0	10.0	0.0	7.8	0.2	1.3	3.5	1.7	0.3	2.5	10.5

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains and pulses are 210.9 million tons in 1989/90, 235.0 million in 1990/91, and 190.0 million forecast in 1991/92.
2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also include copra and palm kernels for all countries.
Note: Entries of 0.0 indicate no reported or insignificant production.

TABLE 3

Wheat Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. July	1991/92 Proj. Aug.	1989/90	Prel. 1990/91	1991/92 Proj. July	1991/92 Proj. Aug.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	226.3	231.9	223.6	2.38	2.56	2.48	2.46	537.6	593.0	556.1	550.5
United States	25.2	28.1	23.5	2.20	2.66	2.35	2.35	55.4	74.5	55.3	55.3
Total Foreign	201.1	203.8	200.1	2.40	2.54	2.49	2.47	482.2	518.4	500.8	495.2
Maj. Foreign Exporters	45.1	45.6	44.0	2.91	3.13	3.15	3.21	131.0	142.8	139.8	141.0
Argentina	5.5	5.9	4.9	1.86	1.86	1.89	1.84	10.2	11.0	10.0	9.0
Australia	9.0	9.2	8.0	1.58	1.67	1.50	1.50	14.2	15.4	12.0	12.0
Canada	13.6	14.0	14.1	1.80	2.27	2.06	2.20	24.6	31.7	29.0	31.0
EC-12	17.0	16.5	17.0	4.83	5.14	5.23	5.24	82.0	84.7	88.8	89.0
Major Importers	96.4	98.2	95.6	2.48	2.66	2.53	2.46	238.8	261.2	243.0	235.3
Brazil	3.4	3.3	2.4	1.65	0.97	1.54	1.33	5.6	3.2	4.0	3.2
China	29.8	30.8	30.7	3.04	3.19	3.08	3.06	90.8	98.0	95.0	94.0
Eastern Europe	9.8	9.8	9.8	4.14	4.18	4.00	4.03	40.7	41.1	39.0	39.4
Egypt	0.6	0.7	0.8	5.05	5.79	6.40	6.40	3.2	4.3	4.8	4.8
Other N. Africa 1/	4.7	5.1	5.2	1.13	1.11	1.40	1.44	5.3	5.6	7.3	7.5
Japan	0.3	0.3	0.2	3.47	3.66	3.51	3.51	1.0	1.0	0.9	0.9
USSR	47.7	48.2	46.5	1.94	2.24	1.98	1.84	92.3	108.0	92.0	85.5
Other Foreign	59.7	60.1	60.5	1.88	1.90	1.95	1.96	112.4	114.4	118.0	118.8
India	24.1	23.5	24.3	2.24	2.12	2.22	2.22	54.1	49.7	54.0	54.0
Iran	6.8	6.5	6.2	0.81	1.08	1.03	1.15	5.5	7.0	6.4	7.1
Mexico	1.0	1.0	0.9	4.21	4.11	3.98	3.98	4.0	3.9	3.5	3.5
Non-EC W. Europe	0.8	0.9	0.8	5.19	5.48	5.01	5.01	4.4	5.1	4.1	4.1
Pakistan	7.7	7.8	8.0	1.87	1.82	1.82	1.82	14.4	14.3	14.5	14.5
South Africa	1.8	1.7	1.9	1.11	1.00	1.08	1.08	2.0	1.7	2.0	2.0
Turkey	8.7	8.8	8.9	1.44	1.71	1.80	1.80	12.5	15.0	16.0	16.0
Others	8.7	10.0	9.7	1.76	1.79	1.81	1.83	15.4	17.8	17.6	17.7

1/ Algeria, Libya, Morocco, and Tunisia.

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TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. July	1991/92 Proj. Aug.	1989/90	Prel. 1990/91	1991/92 Proj. July	1991/92 Proj. Aug.
TOTAL COARSE GRAINS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World 1/	321.0	319.2	320.5	2.49	2.59		2.49	800.0	827.3	828.0	798.6
United States	37.0	36.4	37.4	5.98	6.34		5.81	221.4	230.6	240.9	217.1
Total Foreign	284.0	282.9	283.1	2.04	2.11	2.07	2.05	578.6	596.7	587.1	581.6
Maj. Foreign Exporters	21.3	21.0	21.8	2.46	2.69	2.51	2.57	52.5	56.5	54.5	56.0
Argentina	3.2	3.3	3.5	2.64	3.43	2.88	2.88	8.3	11.2	10.1	10.1
Australia	4.0	4.3	4.8	1.73	1.63	1.53	1.53	6.8	6.9	7.4	7.4
Canada	8.3	8.1	7.8	2.84	3.31	3.16	3.31	23.5	26.8	24.4	25.9
South Africa	4.4	3.8	4.2	2.18	1.97	2.07	2.07	9.5	7.6	8.6	8.6
Thailand	1.6	1.5	1.5	2.78	2.58	2.72	2.72	4.3	4.0	4.1	4.1
Major Importers	103.7	99.8	100.6	2.73	2.84	2.74	2.68	282.7	283.1	276.8	269.6
Eastern Europe	16.5	15.9	16.0	3.66	3.30	3.63	3.63	60.2	52.3	58.0	58.0
EC-12	20.2	19.3	19.2	4.43	4.35	4.65	4.66	89.6	84.1	89.5	89.5
Other W. Europe	3.1	3.0	3.0	3.97	4.47	4.10	4.10	12.4	13.6	12.2	12.2
Mexico	7.5	8.2	8.5	1.88	2.23	1.88	1.98	14.1	18.4	16.0	16.8
USSR	56.0	52.9	53.5	1.87	2.14	1.84	1.71	104.8	113.3	99.5	91.5
Other Major Import. 2/	0.4	0.4	0.4	3.83	3.63	3.70	3.70	1.6	1.5	1.5	1.5
Other Foreign	158.9	162.1	160.7	1.53	1.59	1.59	1.59	243.4	257.1	255.8	256.0
Brazil	12.5	13.5	13.5	1.79	1.79	1.98	1.98	22.5	24.2	26.7	26.7
China	28.2	29.1	28.3	3.31	3.64	3.52	3.52	93.5	106.0	99.4	99.4
India	37.7	38.9	37.6	0.92	0.90	0.87	0.86	34.6	35.0	33.0	32.5
Indonesia	2.7	2.9	3.1	1.85	1.83	1.84	1.84	5.0	5.3	5.6	5.6
Nigeria	9.9	9.5	9.9	0.82	0.67	0.84	0.84	8.1	6.3	8.3	8.3
Philippines	3.6	3.8	3.9	1.24	1.24	1.24	1.24	4.5	4.7	4.9	4.9
Turkey	4.4	4.5	4.5	1.70	1.99	2.17	2.17	7.5	8.9	9.7	9.7
Others	59.8	59.9	60.1	1.13	1.11	1.15	1.15	67.8	66.8	68.3	68.9
BARLEY											
World	74.7	73.6	76.3	2.27	2.53		2.28	169.8	186.2	176.0	174.1
United States	3.4	3.0	3.4	2.62	3.00		3.00	8.8	9.1	10.4	10.2
Total Foreign	71.4	70.6	72.9	2.26	2.51	2.29	2.25	161.0	177.1	165.6	163.8
Australia	2.3	2.5	2.9	1.75	1.65	1.50	1.50	4.0	4.2	4.4	4.4
Canada	4.7	4.7	4.7	2.50	3.03	2.83	3.09	11.7	14.1	13.0	14.5
China	3.3	3.3	3.3	1.74	1.73	1.73	1.73	5.7	5.7	5.7	5.7
Eastern Europe	3.6	3.6	3.6	4.03	4.02	3.82	3.82	14.5	14.4	13.8	13.8
EC-12	12.6	12.3	12.0	4.05	4.13	4.16	4.18	51.0	50.7	50.3	50.3
Other W. Europe	1.5	1.5	1.5	3.87	4.35	3.91	3.91	5.9	6.4	5.9	5.9
Turkey	3.4	3.4	3.4	1.46	1.76	2.00	2.00	4.9	6.0	6.8	6.8
USSR	27.6	26.1	28.5	1.75	2.34	1.79	1.65	48.5	61.0	51.0	47.0
Others	12.4	13.3	12.9	1.19	1.10	1.19	1.20	14.8	14.6	14.9	15.5

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Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	July	Aug.	1989/90	1990/91	July	Aug.
CORN	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	126.1	127.0	129.8	3.65	3.70		3.62	460.7	470.4	493.4	469.4
United States	26.2	27.1	27.8	7.30	7.44		6.77	191.2	201.5	210.2	188.4
Total Foreign	99.9	99.9	102.0	2.70	2.69	2.76	2.76	269.6	268.9	283.2	281.0
Maj. Foreign Exporters	6.7	6.4	6.9	2.72	2.89	2.75	2.75	18.2	18.5	19.0	19.0
Argentina	1.7	2.0	2.2	3.06	4.00	3.27	3.27	5.2	7.8	7.2	7.2
South Africa	3.6	3.1	3.4	2.47	2.26	2.35	2.35	8.9	7.0	8.0	8.0
Thailand	1.4	1.4	1.3	2.93	2.74	2.88	2.88	4.1	3.7	3.8	3.8
Major Importers	21.2	19.6	21.4	3.93	3.51	3.89	3.90	83.3	68.9	85.2	83.5
Eastern Europe	7.1	6.4	6.6	4.14	3.29	4.29	4.29	29.2	21.1	28.3	28.3
EC-12	3.9	3.5	4.0	6.91	6.24	7.07	7.07	26.9	21.7	28.3	28.3
Other W. Europe	0.2	0.2	0.2	7.68	7.91	7.88	7.88	1.7	1.8	1.7	1.7
Mexico	5.8	6.6	7.0	1.68	2.14	1.71	1.83	9.8	14.1	12.0	12.8
USSR	4.1	2.8	3.5	3.71	3.50	3.63	3.43	15.3	9.8	14.5	12.0
Other Maj. Import. 2/	0.1	0.1	0.1	4.28	4.10	4.18	4.18	0.5	0.5	0.5	0.5
Other Foreign	72.0	73.9	73.6	2.33	2.46	2.42	2.42	168.0	181.5	178.9	178.4
Brazil	12.1	13.0	13.0	1.80	1.81	2.00	2.00	21.8	23.5	26.0	26.0
Canada	1.0	1.0	1.1	6.36	7.16	6.00	6.00	6.4	7.2	6.6	6.6
China	20.4	21.4	20.6	3.88	4.21	4.08	4.08	78.9	90.0	84.0	84.0
Egypt	0.8	0.8	0.9	5.37	5.43	5.59	5.59	4.5	4.6	4.8	4.8
India	5.9	5.9	5.7	1.61	1.61	1.53	1.49	9.4	9.5	9.0	8.5
Indonesia	2.7	2.9	3.1	1.85	1.83	1.84	1.84	5.0	5.3	5.6	5.6
Philippines	3.6	3.8	3.9	1.24	1.24	1.24	1.24	4.5	4.7	4.9	4.9
Zimbabwe	1.2	1.1	1.2	1.72	1.45	1.67	1.67	2.0	1.6	2.0	2.0
Others	24.4	24.0	24.2	1.46	1.47	1.49	1.49	35.5	35.2	36.1	36.1
SORGHUM											
World	40.6	39.6	39.9	1.35	1.34		1.33	54.8	53.2	54.3	53.1
United States	4.5	3.7	3.9	3.48	3.95		3.64	15.6	14.5	16.0	14.3
Total Foreign	36.1	35.9	36.0	1.08	1.08	1.07	1.08	39.1	38.7	38.3	38.8
Argentina	0.7	0.7	0.7	2.86	3.57	2.86	2.86	2.0	2.5	2.0	2.0
Australia	0.4	0.5	0.5	2.27	1.95	2.00	2.00	0.9	0.9	1.0	1.0
China	1.6	1.6	1.6	2.72	3.35	3.17	3.17	4.4	5.2	5.0	5.0
India	14.9	15.0	15.0	0.86	0.83	0.80	0.83	12.9	12.5	12.0	12.5
Mexico	1.3	1.3	1.2	2.88	2.85	2.92	2.92	3.8	3.7	3.5	3.5
Nigeria	4.4	4.4	4.4	0.80	0.64	0.80	0.80	3.5	2.8	3.5	3.5
South Africa	0.2	0.2	0.2	1.11	1.12	1.11	1.11	0.3	0.2	0.3	0.3
Sudan	3.1	3.0	3.0	0.52	0.50	0.50	0.50	1.6	1.5	1.5	1.5
Thailand	0.2	0.2	0.2	1.44	1.39	1.47	1.47	0.2	0.3	0.3	0.3
Others	9.2	9.1	9.2	1.03	1.00	1.01	1.01	9.5	9.1	9.3	9.3

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TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	July	Aug.	1989/90	1990/91	July	Aug.
OATS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	22.7	21.7	21.1	1.84	1.98		1.79	41.9	43.0	39.0	37.8
United States	2.8	2.4	2.0	1.95	2.16		1.87	5.4	5.2	4.1	3.8
Total Foreign	19.9	19.3	19.1	1.83	1.96	1.84	1.78	36.4	37.8	35.0	34.0
USSR	10.8	10.7	10.5	1.57	1.68	1.52	1.43	16.8	18.0	16.0	15.0
Maj. Foreign Exporters	3.7	3.3	3.4	1.97	2.14	2.10	2.10	7.3	7.2	7.2	7.2
Argentina	0.4	0.3	0.4	1.44	1.34	1.29	1.29	0.6	0.4	0.5	0.5
Australia	1.1	1.2	1.3	1.44	1.42	1.38	1.38	1.6	1.6	1.8	1.8
Canada	1.7	1.5	1.4	2.08	2.33	2.44	2.44	3.5	3.5	3.3	3.3
Sweden	0.4	0.4	0.4	3.54	4.42	3.86	3.86	1.5	1.6	1.6	1.6
Other Foreign	5.5	5.3	5.1	2.24	2.40	2.30	2.30	12.3	12.6	11.8	11.8
China	0.6	0.6	0.6	1.20	1.21	1.18	1.18	0.7	0.7	0.7	0.7
Eastern Europe	1.2	1.2	1.2	2.55	2.70	2.56	2.56	3.2	3.3	3.0	3.0
Czechoslovakia	0.1	0.1	0.1	3.24	4.55	4.00	4.00	0.3	0.4	0.4	0.4
Poland	0.8	0.7	0.7	2.72	2.84	2.70	2.70	2.2	2.1	1.9	1.9
EC-12	1.9	1.6	1.6	2.82	3.07	3.02	3.02	5.2	5.1	4.9	4.9
France	0.3	0.2	0.2	3.73	3.86	3.81	3.81	1.0	0.9	0.8	0.8
Germany	0.7	0.6	0.5	3.68	3.93	4.44	4.44	2.4	2.4	2.4	2.4
Finland	0.4	0.5	0.4	3.24	3.67	3.28	3.28	1.4	1.7	1.3	1.3
Norway	0.1	0.1	0.1	3.13	4.58	4.00	4.00	0.4	0.6	0.5	0.5
Others	1.3	1.2	1.2	1.12	1.09	1.11	1.11	1.4	1.4	1.4	1.4
RYE											
World	16.9	16.7	13.5	2.22	2.32		2.22	37.6	38.8	30.6	30.1
United States	0.2	0.2	0.2	1.77	1.70		1.73	0.3	0.3	0.3	0.3
Total Foreign	16.7	16.6	13.4	2.23	2.33	2.27	2.23	37.3	38.6	30.3	29.8
USSR	10.7	10.4	8.0	1.87	2.02	1.81	1.75	20.1	21.0	14.5	14.0
Maj. Foreign Exporter											
Canada	0.5	0.5	0.3	1.74	1.65	1.69	1.69	0.9	0.9	0.5	0.5
Other Foreign											
Eastern Europe	3.3	3.4	3.4	2.94	2.88	2.85	2.85	9.7	9.9	9.6	9.6
Hungary	0.1	0.1	0.1	2.06	2.46	2.22	2.22	0.2	0.2	0.2	0.2
Poland	2.9	3.1	3.0	2.95	2.86	2.85	2.85	8.6	8.8	8.6	8.6
Czechoslovakia	0.2	0.2	0.2	4.05	4.26	3.82	3.82	0.7	0.7	0.7	0.7
EC-12	1.6	1.6	1.2	3.33	3.35	3.83	3.83	5.3	5.3	4.7	4.7
Denmark	0.1	0.1	0.1	4.82	4.95	4.84	4.84	0.5	0.5	0.5	0.5
Germany	1.0	1.1	0.7	3.86	3.78	4.93	4.93	3.9	4.0	3.5	3.5
Others	0.6	0.6	0.5	2.29	2.38	2.17	2.17	1.3	1.5	1.0	1.0

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.
2/ Japan, Republic of Korea, and Taiwan.

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TABLE 5

Rice Area, Yield, and Production
World and Selected Countries and Regions

	AREA			YIELD				PRODUCTION (Rough Basis)				MILLING RATE				PRODUCTION (Milled Basis)			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.			Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	July	August	1989/90	1990/91	July	August	1989/90	1990/91	July	August	1989/90	1990/91	July	August
	—Million Hectares—			—Metric Tons Per Hectare—				—Million Metric Tons—				—In Percent—				—Million Metric Tons—			
World	146.6	147.0	147.2	3.5	3.5		3.5	508.1	514.3	512.3	508.6	67.7	67.7	67.7	67.7	344.0	348.3	344.2	344.2
United States	1.1	1.1	1.1	6.4	6.2		6.2	7.0	7.0	7.1	7.1	73.0	73.0	70.0	70.0	5.1	5.1	5.0	5.0
Total Foreign	145.5	145.9	146.1	3.4	3.5	3.5	3.4	501.1	507.2	505.2	501.5	67.6	67.7	67.2	67.5	338.9	343.2	339.2	339.3
Maj. Foreign Exporters	16.8	16.5	16.8	2.3	2.2	2.3	2.3	38.5	35.7	38.2	38.2	64.0	63.8	64.0	64.0	24.6	22.8	24.4	24.4
Burma	4.7	4.8	4.7	2.9	2.9	2.9	2.9	13.5	13.7	13.4	13.4	60.0	60.0	60.0	60.0	8.1	8.2	8.0	8.0
Pakistan	2.1	2.0	2.1	2.3	2.3	2.3	2.3	4.8	4.7	4.8	4.8	66.7	66.7	66.7	66.7	3.2	3.1	3.2	3.2
Thailand	10.0	9.7	10.0	2.0	1.8	2.0	2.0	20.2	17.3	20.0	20.0	66.0	66.0	66.0	66.0	13.3	11.4	13.2	13.2
Major Importers	13.9	13.9	13.7	4.2	4.2	4.2	4.2	58.6	58.4	58.0	57.7	66.1	66.0	66.1	66.1	38.8	38.5	38.3	38.1
EC-12	0.3	0.4	0.4	6.2	6.4	6.0	6.0	2.1	2.4	2.3	2.3	67.0	67.4	67.4	67.4	1.4	1.6	1.5	1.5
Indonesia	10.5	10.5	10.3	4.2	4.3	4.3	4.3	44.7	45.2	44.6	44.5	65.0	65.0	65.0	65.0	29.1	29.4	29.0	28.9
Nigeria	0.6	0.7	0.7	1.4	1.4	1.4	1.4	0.9	0.9	0.9	0.9	60.0	60.0	60.0	60.0	0.5	0.6	0.6	0.6
Republic of Korea	1.3	1.2	1.2	6.4	6.2	6.4	6.4	8.1	7.7	7.8	7.8	72.8	72.6	72.7	72.7	5.9	5.6	5.7	5.7
Other Maj. Import. 1/	1.2	1.1	1.1	2.4	1.9	2.3	2.0	2.8	2.2	2.3	2.2	65.9	65.4	65.4	65.7	1.9	1.4	1.5	1.5
Other Foreign	114.8	115.5	115.6	3.5	3.6	3.5	3.5	404.0	413.2	405.4	405.6	68.2	68.2	68.2	68.2	275.5	281.9	276.5	276.7
Australia	0.1	0.1	0.1	8.0	8.6	7.9	7.9	0.9	0.8	0.9	0.9	71.5	71.5	71.5	71.5	0.7	0.5	0.6	0.6
Bangladesh	10.5	10.4	10.5	2.6	2.6	2.5	2.6	26.8	26.9	27.0	27.6	66.7	66.7	66.7	66.7	17.9	17.9	18.0	18.4
Brazil	4.3	4.5	5.3	1.7	2.1	1.9	1.9	7.2	9.3	10.0	10.0	68.0	68.0	68.0	68.0	4.9	6.3	6.8	6.8
China	32.7	33.1	32.6	5.5	5.6	5.5	5.5	180.1	185.0	180.0	180.0	70.0	70.0	70.0	70.0	126.1	129.5	126.0	126.0
India	42.2	42.2	42.0	2.6	2.7	2.6	2.6	111.1	112.5	109.5	109.5	66.7	66.7	66.7	66.7	74.1	75.0	73.0	73.0
Japan	2.1	2.1	2.1	6.2	6.3	6.2	6.2	12.9	13.1	12.9	12.9	72.8	72.8	72.8	72.8	9.4	9.6	9.4	9.4
Philippines	3.4	3.5	3.6	2.6	2.7	2.6	2.6	8.9	9.4	9.5	9.5	65.0	65.0	65.0	65.0	5.8	6.1	6.2	6.2
USSR	0.7	0.6	0.7	3.9	4.0	4.0	4.0	2.6	2.4	2.6	2.6	65.0	65.0	65.0	65.0	1.7	1.6	1.7	1.7
Vietnam	5.9	5.9	5.8	3.1	3.1	3.0	3.0	18.4	18.0	17.5	17.5	65.0	65.0	65.0	65.0	12.0	11.7	11.4	11.4
Others	12.9	13.2	13.0	2.7	2.7	2.7	2.7	35.0	35.8	35.4	35.1	66.1	66.2	66.1	66.1	23.2	23.7	23.4	23.2

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

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TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	July	Aug.	1989/90	1990/91	July	Aug.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SOYBEANS											
World	58.26	54.05	55.94	1.84	1.91		1.86	107.27	103.39	107.01	104.22
United States	24.09	22.87	23.77	2.17	2.29		2.14	52.35	52.30	53.62	50.86
Total Foreign	34.16	31.19	32.17	1.61	1.64	1.66	1.66	54.92	51.09	53.40	53.36
Maj. Foreign Exporters	16.35	14.40	15.00	1.90	1.83	1.88	1.88	31.09	26.30	28.25	28.25
Argentina	4.95	4.75	5.00	2.17	2.27	2.15	2.15	10.75	10.80	10.75	10.75
Brazil	11.40	9.65	10.00	1.78	1.61	1.75	1.75	20.34	15.50	17.50	17.50
Other Foreign	17.81	16.79	17.17	1.34	1.48	1.46	1.46	23.83	24.79	25.15	25.11
Canada	0.54	0.49	0.58	2.26	2.64	2.33	2.33	1.22	1.29	1.35	1.35
China	8.06	7.60	7.95	1.27	1.50	1.45	1.45	10.23	11.40	11.50	11.50
Eastern Europe	0.70	0.36	0.28	0.97	1.07	1.30	1.30	0.68	0.39	0.36	0.36
EC-12	0.63	0.69	0.58	3.13	3.12	3.14	3.14	1.98	2.17	1.81	1.81
India	2.13	2.30	2.40	0.80	1.04	1.00	1.00	1.72	2.40	2.40	2.40
Indonesia	1.21	1.24	1.26	1.09	1.09	1.11	1.11	1.32	1.35	1.40	1.40
Paraguay	0.98	0.89	0.90	1.61	1.46	1.78	1.78	1.58	1.30	1.60	1.60
USSR	0.83	0.83	0.81	1.15	1.06	1.14	1.14	0.96	0.88	0.96	0.92
Others	2.74	2.39	2.42	1.52	1.51	1.56	1.56	4.17	3.61	3.77	3.77
COTTONSEED											
World	32.06	33.52	34.90	0.96	1.00		1.00	30.92	33.53	35.07	34.87
United States	3.86	4.75	5.44	1.10	1.14		1.14	4.24	5.41	5.76	6.19
Total Foreign	28.20	28.77	29.46	0.95	0.98	0.99	0.97	26.68	28.11	29.31	28.68
China	5.20	5.59	6.00	1.24	1.37	1.39	1.36	6.44	7.66	8.50	8.16
India	7.33	7.60	7.80	0.60	0.53	0.54	0.54	4.40	4.00	4.20	4.20
Pakistan	2.60	2.69	2.78	1.12	1.21	1.23	1.23	2.91	3.27	3.40	3.40
USSR	3.33	3.15	3.00	1.53	1.56	1.56	1.53	5.11	4.92	4.93	4.60
Others	9.74	9.74	9.89	0.80	0.85	0.84	0.84	7.82	8.26	8.29	8.32
PEANUTS											
World	19.82	19.52	19.92	1.11	1.13		1.14	22.06	22.12	22.52	22.69
United States	0.67	0.73	0.80	2.72	2.23		2.91	1.81	1.63	2.14	2.31
Total Foreign	19.16	18.79	19.12	1.06	1.09	1.07	1.07	20.25	20.48	20.38	20.38
Argentina	0.18	0.20	0.19	1.87	2.37	2.11	2.11	0.34	0.48	0.40	0.40
China	2.96	2.96	3.02	1.81	2.15	1.92	1.92	5.37	6.37	5.80	5.80
India	8.71	8.10	8.30	0.93	0.90	0.92	0.92	8.09	7.30	7.60	7.60
Senegal	0.78	0.92	0.90	1.04	0.73	0.77	0.77	0.82	0.67	0.70	0.70
South Africa	0.09	0.09	0.09	1.28	1.59	1.50	1.50	0.11	0.14	0.14	0.14
Sudan	0.55	0.54	0.53	0.73	0.60	0.75	0.75	0.40	0.33	0.40	0.40
Others	5.89	5.99	6.09	0.87	0.87	0.88	0.88	5.13	5.21	5.35	5.35

TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	July	Aug.	1989/90	1990/91	July	Aug.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SUNFLOWERSEED											
World	15.88	15.92	15.77	1.38	1.38		1.36	21.87	22.01	21.60	21.43
United States	0.72	0.75	1.03	1.10	1.38		1.50	0.80	1.03	1.52	1.54
Total Foreign	15.16	15.17	14.74	1.39	1.38	1.35	1.35	21.07	20.98	20.09	19.89
Argentina	2.80	2.30	2.50	1.36	1.70	1.40	1.40	3.80	3.90	3.50	3.50
China	0.72	0.70	0.71	1.49	1.71	1.62	1.62	1.06	1.20	1.15	1.15
EC-12	2.12	2.55	2.25	1.67	1.61	1.66	1.66	3.54	4.09	3.75	3.75
East Europe	1.27	1.23	1.17	1.81	1.70	1.77	1.77	2.29	2.09	2.08	2.08
USSR	4.46	4.67	4.60	1.59	1.41	1.45	1.43	7.07	6.56	6.80	6.60
Others	3.80	3.73	3.50	0.87	0.84	0.80	0.80	3.32	3.14	2.81	2.81
RAPESEED											
World	17.12	18.13	19.80	1.28	1.42		1.37	21.85	25.74	27.09	27.09
United States 1/	0.03	0.03	0.06	1.58	1.74		1.75	0.05	0.05	0.11	0.11
Total Foreign	17.09	18.10	19.74	1.28	1.42	1.39	1.37	21.80	25.68	26.99	26.99
Canada	2.90	2.58	3.20	1.07	1.27	1.31	1.31	3.10	3.28	4.20	4.20
China	4.99	5.50	6.10	1.09	1.26	1.22	1.16	5.44	6.96	7.10	7.10
EC-12	1.81	2.13	2.40	2.96	2.91	2.97	2.94	5.34	6.21	7.07	7.07
East Europe	0.81	0.74	0.68	2.66	2.38	2.48	2.48	2.15	1.75	1.69	1.69
India	4.99	5.60	5.70	0.83	1.02	0.88	0.88	4.12	5.70	5.00	5.00
Others	1.59	1.54	1.66	1.04	1.16	1.12	1.16	1.65	1.78	1.93	1.93
FLAXSEED											
World	3.74	3.79	3.61	0.50	0.62		0.58	1.85	2.34	2.10	2.10
United States	0.07	0.10	0.12	0.47	0.95		0.97	0.03	0.10	0.11	0.11
Total Foreign	3.67	3.69	3.50	0.50	0.61	0.57	0.57	1.82	2.24	1.98	1.98
Argentina	0.58	0.58	0.55	0.90	0.83	0.84	0.84	0.52	0.48	0.46	0.46
Canada	0.60	0.73	0.54	0.83	1.29	1.16	1.16	0.50	0.94	0.63	0.63
India	1.18	1.20	1.20	0.29	0.33	0.33	0.33	0.34	0.40	0.40	0.40
USSR	0.97	0.85	0.85	0.24	0.19	0.21	0.21	0.23	0.16	0.18	0.18
Others	0.36	0.34	0.36	0.67	0.77	0.89	0.89	0.24	0.26	0.32	0.32
MAJOR OILSEEDS	146.88	144.93	149.93	1.40	1.44		1.42	205.83	209.11	215.39	212.40
United States	29.44	29.23	31.21	2.01	2.07		1.96	59.29	60.53	63.24	61.12
Total Foreign	117.44	115.70	118.73	1.25	1.28		1.27	146.54	148.58	152.15	151.28
COPRA	--	--	--	--	--	--	--	4.88	4.98	4.81	4.81
PALM KERNEL	--	--	--	--	--	--	--	3.33	3.36	3.59	3.59
TOTAL OILSEEDS	--	--	--	--	--	--	--	*214.04*	*217.44*	*223.79*	*220.80*
PALM OIL 2/	--	--	--	--	--	--	--	10.91	11.04	11.86	11.91

1/ U.S. rapeseed estimates by the WAOB and Interagency Oilseeds Committee. 2/ Not included in total oilseeds.

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TABLE 7

Cotton Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	July	Aug.	1989/90	1990/91	July	Aug.
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	31.6	33.3	34.8	552	566		570	80.0	86.7	90.3	91.1
United States	3.9	4.7	5.4	688	711		706	12.2	15.5	16.2	17.6
Total Foreign	27.7	28.6	29.3	533	542	548	545	67.8	71.2	74.1	73.5
Maj. Foreign Exporters	13.1	13.3	13.6	727	783	778	775	43.7	47.7	49.1	48.4
Australia	0.2	0.3	0.3	1,326	1,411	1,322	1,322	1.4	1.8	1.7	1.7
Central America 1/	0.1	0.1	0.1	832	802	793	793	0.3	0.3	0.3	0.3
China	5.2	5.6	6.0	728	807	803	798	17.4	20.7	22.5	22.0
Egypt	0.4	0.4	0.4	683	719	755	755	1.3	1.4	1.3	1.3
Mexico	0.2	0.2	0.3	891	913	837	837	0.8	0.8	1.0	1.0
Pakistan	2.6	2.7	2.8	560	607	612	612	6.7	7.5	7.8	7.8
Sudan	0.3	0.2	0.2	456	422	498	498	0.6	0.4	0.4	0.4
Turkey	0.7	0.7	0.6	851	930	887	887	2.8	2.9	2.5	2.5
USSR	3.3	3.2	3.0	805	827	821	817	12.3	12.0	11.5	11.3
Major Importers 2/	0.4	0.4	0.3	886	794	911	911	1.5	1.5	1.4	1.4
Other Foreign	14.2	14.9	15.4	346	321	335	334	22.6	22.0	23.6	23.6
Argentina	0.6	0.6	0.6	486	444	465	465	1.3	1.3	1.3	1.3
Brazil	1.9	2.0	2.0	347	340	381	381	3.0	3.1	3.5	3.5
India	7.3	7.6	7.8	315	264	279	279	10.6	9.2	10.0	10.0
Syria	0.2	0.2	0.2	930	963	934	934	0.7	0.7	0.7	0.7
Others	4.3	4.6	4.9	358	370	370	368	7.0	7.7	8.2	8.2

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

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TABLE 8

The table below presents a 10-year record of the difference between the August projections and the final estimates. Using world wheat production as an example, changes between the August projection and the final estimate have averaged 13.5 million tons (2.7 percent) and ranged from -32.1 to 10.7 million tons. The August projection has been below the final 6 times and above the final 4 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 - 1990/91 1/					
	Difference		Lowest	Highest	Below	Above
	Average	Average	Difference		Final	Final
	Percent	---Million Metric Tons---			Number of Years 2/	
WHEAT						
World	2.7	13.5	-32.1	10.7	6	4
U.S.	1.4	0.9	-1.8	2.0	5	5
Foreign	3.1	13.5	-31.1	12.0	6	4
COARSE GRAINS 3/						
World	1.5	11.5	-22.5	26.9	7	3
U.S.	4.9	8.8	-16.7	30.6	7	3
Foreign	1.5	8.4	-21.5	13.8	4	6
RICE (Milled)						
World	2.7	8.4	-24.4	3.5	7	3
U.S.	5.1	0.2	-0.4	0.3	7	3
Foreign	2.7	8.4	-24.7	3.8	7	3
SOYBEANS						
World	2.5	2.3	-2.0	5.0	4	6
U.S.	4.9	2.4	-3.8	5.7	4	6
Foreign	5.9	2.5	-3.3	5.4	4	6
		---Million 480-lb. Bales---				
COTTON						
World	3.4	2.7	-11.1	5.5	5	4
U.S.	5.2	0.7	-1.9	1.0	7	2
Foreign	3.3	2.3	-10.7	4.5	5	5
UNITED STATES		-------Million Bushels-------				
CORN	10.1	598	-1,085	2,034	7	3
SORGHUM	12.3	93	-213	171	7	3
BARLEY	5.2	27	-43	52	3	6
OATS	9.9	39	-37	144	3	7

1/ The final estimate for 1981/82-1989/90 is defined as the first November estimate following the marketing year and for 1990/91 last month's estimate.
2/ May not total ten if projection was the same as the final.
3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

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MAP 1

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

AUGUST 12, 1991

NOAA/USDA JOINT AGRICULTURAL WEATHER FACILITY

CANADA

July's drying trend helps crop development. Early August showers are timely for filling.

UNITED STATES

Below normal July rainfall and periodic heat depletes soil moisture in the Corn Belt. Corn and soybean conditions deteriorate. Recent showers benefit pod-filling soybeans. Favorable weather prevails for cotton and Northwest wheat.

SOUTH AMERICA

In Argentina, dry weather promotes soybean harvesting. Adequate moisture exists for winter wheat germination in Argentina and Brazil.

EUROPE

Favorable weather prevails for grain harvesting. Recent showers help corn in France. Heavy rain inundates crops from Romania to Austria. Hot weather persists in Spain.

WESTERN USSR

Hot, dry weather in the east helps small grain harvesting but stresses summer crops. Heavy rain in the western Ukraine lodges crops.

SOUTH ASIA

Widespread rain helps late grain, cotton, and oilseed planting but causes some flooding. August showers in northern India benefit rice transplanting.

NEW LANDS

Recent rains come too late for maturing spring grains in Kazakhstan but help filling crops in Western Siberia.

EASTERN ASIA

Recent heavy rains flood the Yangtze. Typhoons hit southern China. Showers ease drought in Jiangxi. Moisure is adequate in the North China Plain but excessive in Manchuria.

SOUTHEAST ASIA

Limited moisture stresses Thailand's corn. Recent rain benefits most rice areas. In the Philippines, tropical storms flood northern grain regions.

AUSTRALIA

A drying trend prevails in southern Queensland and northern New South Wales.

(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 447-7917.

WEATHER BRIEFS

SOVIET NEW LANDS: RAIN WIDESPREAD, BUT TOO LATE

Precipitation was more widespread during the period of July 12 - August 11, 1991, compared to recent months across the New Lands. In general, the moisture eased dryness and halted crop deterioration caused by stress, but it came too late. Spring grains in the northern Urals benefited from above normal precipitation during this period. Rainfall, although still below normal amounts, increased compared to recent months, across Kazakhstan and the southern Urals. This rainfall, at best, limited further deterioration of spring grains. As of August 12, 1991, the spring grains were nearly mature in these regions, therefore the rain was of little benefit to these crops. During July, 1991, precipitation was well below normal in western West Siberia; large areas received only 25 to 50 percent of normal rainfall. However, during the first week of August rainfall was beneficial, stabilizing crop conditions, since spring grains there were mostly in the grain-filling stage. Temperatures were mostly mild across the New Lands during July 12 - August 11, 1991, which somewhat lessened the effects of the dry weather. The only outbreak of hot temperatures occurred during the week of July 21, 1991, when maximum daily temperatures reached 33 to 38 degrees Celsius in the western New Lands and benefited spring grains by accelerating ripening.

INDIA: RAINFALL REACHES NORTHERN AREAS

The monsoon finally reached northern India and Pakistan crop regions after stalling in early July in an area from Gujarat northeastward to Uttar Pradesh (reported in last month's circular). During the period of July 12 - August 11, 1991, rainfall was more widespread, but amounts for the season are still below normal in the north, particularly, Haryana, Uttar Pradesh, and Bihar. Low rainfall has caused delays in rice transplanting, and corn and oilseed planting. As of August 1, 1991, rice transplanting was only 33 percent complete in Bihar, where 70 percent completion is normal for that date. Precipitation has been very heavy and mostly above normal for this period in Gujarat, Madhya Pradesh, and Orissa. This increased precipitation has improved peanut outlook in Gujarat, although planting is still well behind normal rates. As of August 8, 1991, the Indian Government reported 1.53 million hectares of peanuts were planted; 1.8 million hectares is normal. The eastern rice area received moderate to heavy rainfall. Weekly rainfall has continued to be light-to-moderate in the south, benefiting summer crops which are advancing through reproduction and grain-filling, as of August 12, 1991.

ROMANIA: ABOVE NORMAL RAIN

Rainfall in Romania has been well above normal for the period of July 12 - August 11, 1991. July 1991 precipitation was 173 percent of normal, ending a year of below-normal precipitation. Weekly rainfall amounts have been generally 25-50 mm from mid-July into early August. Heavy rain of over 200 mm fell across northeast Romania during the week of July 28, 1991, causing localized flooding and some crop damage.

PRODUCTION BRIEFS

PHILIPPINES: VOLCANO ERUPTIONS CAUSE LITTLE DAMAGE TO RICE CROP

Initial reports from the U.S. agricultural counselor in Manila indicate that Philippine rice production will not be significantly affected by Mt. Pinatubo's volcanic eruptions. According to the Philippine National Food Authority's preliminary estimate, 32,000 metric tons of milled rice were lost due to the eruptions, and another 585 metric tons of rice stocks were lost when a warehouse collapsed due to heavy accumulation of volcanic debris. Volcanic debris is making field work difficult for the July-September wet-season crop. About 10,000 hectares, out of a total of 174,000 in the surrounding area, are estimated to be unplantable. Last year the region's wet-season crop totaled about 390,000 tons (milled basis) from a total Philippine crop of 6.2 million tons.

CANADA: INITIAL PAYMENTS ANNOUNCED FOR GRAINS

The Canadian Government recently announced the initial payments for wheat and barley by the Canadian Wheat Board (CWB) for marketing year 1991/92. Payments for base grades of wheat and barley and designated malting barley all declined substantially again this year. Initial payments for number 1 red spring wheat dropped 33 percent to Can$95 from Can$135, durum dropped 28 percent to Can$90, barley dropped 22 percent to Can$70, and malting barley dropped 28 percent to Can$90. Grade and quality price differentials will be announced later. The initial wheat payments are the lowest since 1975/76. The low prices are a reflection of anticipated low world prices for the remainder of the year and allow the CWB a greater opportunity to price wheat and barley exports aggressively.

COSTA RICA: RICE PRICE INCREASED

The consumer price for rice was increased 36 percent, according to the U.S. agricultural attache in San Jose. Prices are revised periodically according to a production cost model to ensure adequate domestic production. The price increase affects the new crop which is beginning to be harvested from the south and central Pacific areas; harvest will continue until December. The rice office believes that low stock levels necessitate imports, especially before the major harvest arrives in October. It reports planted area has decreased by 11 percent from 1990/91. Rice millers consider the price increase insufficient whereas labor unions believe it is excessive. The National Production Council (CNP) is against imports because of the financial burden, and because it believes that stock levels are high enough to get by until the new crop is harvested. The CNP is in charge of imports.

SOVIET UNION: GRAIN PROCUREMENT POLICY SET

The Soviet Central Government has issued a decree outlining new grain procurement policies. The decree is designed to ensure grain and oilseed deliveries to both the State and the various Republic Governments, and sets a procurement target of 77 million tons of grain. About 15 percent of the total procurement will be delivered to the central government pool, which will provide grain to the military services, health care facilities, and other centralized agencies. The remainder will go to republic grain pools, which will service the general cereal-product needs of the respective republics. Particular attention will be paid to increasing procurements of grain for compound feed in order to reduce feeding of un-supplemented grain. State orders for grain deliveries to the State will be mandatory. Once the producer meets the State order, however, the rest of the harvest can be marketed in several ways: traded to the State for equipment and consumer goods; sold to the State for hard currency; or disposed of through other approved channels, including the open market.

AUSTRALIA: CATTLE HERDS EXPAND, SHEEP NUMBERS FALL SHARPLY

The U.S. agricultural counselor in Canberra reports that Australian cattle numbers will expand more slowly than expected this year and again next year. Sheep numbers are expected to fall 10 percent in 1991 and 6 percent in 1992. Cattle herd growth is expected to be slow, despite the falling sheep numbers and limited prospects for grain profits, because sheep and grain farmers do not have the funds to shift to cattle. Dry weather in Southern Australia in the first half of this year also limited herd expansion prospects.

CHINA: RED MEAT PRODUCTION INCREASING

China's 1991 red meat production is estimated at a record 25.1 million tons, a gain of 3 percent. Pork is by far the predominant meat with 1991 production estimated at 23.3 million tons up only 2 percent from 1990 after a 7 percent expansion the year before. The slow-down is expected due to the recent disastrous flood which damaged the feed supply system, destroyed feedstuffs and buildings, and drowned some hogs. In 1992, pork output is forecast to grow by over 5 percent to 24.6 million tons. Beef production is projected up 14 percent to 1.43 million tons this year and up 13 percent to 1.61 million tons in 1992. Sheep and goat meat output is projected to expand 8 percent to 1.15 million tons in 1991 and gain 4 percent to 1.2 million tons in 1992. These changes in beef and sheep/goat meat production are believed to be largely due to better management by livestock producing households. Many have been allowed to lease 50 to 100 hectares of grazing rights, which has encouraged them to invest in pasture improvement.

CHINA: FLOODING HURTS SUMMER GRAIN, AUTUMN CROPS

The severe floods that swept over central China this summer began to recede by the end of July, and officials are starting to tally the damage. A spokesman for the State Statistical Bureau (SSB) reported that flooding in the Yangtze River valley covered 16 million hectares, with crops on 2.6 million hectares of crops completely destroyed. The crops most affected were winter wheat, winter barley, rice, and cotton. In addition, the SSB said about 4 million tons of grain in storage were destroyed by the floods. Despite these losses, the SSB put China's 1991 summer-harvested grain output at 98.2 million tons, down only

1.9 percent from last year's harvest. (Normally about 86 percent of the summer-harvested grain crop is winter wheat). Record and near-record harvests in Shandong and other northern Chinese provinces are apparently offsetting some of the summer grain losses reported in Anhui, Jiangsu, and Henan. Significant amounts of early rice and cotton also were destroyed in the flooding. Planting of autumn-harvested crops (late rice, corn, soybeans, etc.) was delayed by more than two weeks in the worst-affected areas. Chinese officials fear that these crops face a greater-than-normal probability of being hurt by cold temperatures and early frosts this fall. As a result, they expect total agricultural production for 1991 to be lower than last year.

CHINA: NORTHEAST FLOODS, SOUTHERN DROUGHT AFFECT CROPS

Although the floods in central China have been getting all the attention this summer, other parts of China also are experiencing difficult weather. In the Northeast provinces of Heilongjiang, Jilin, and Liaoning, flash floods and rising rivers have affected more than 3.0 million hectares of cropland, predominately mature spring wheat, soybeans, and corn. Meanwhile, a drought in southern China has intensified over the past 2 months, threatening the single season and late rice crops. Reservoirs are drying up and drinking water is being rationed in many areas. In mid-July, two typhoons hit the coast of southern China with extremely strong winds and heavy rain, causing serious localized crop damage. The rain eased the drought in Guangdong and southern Guangxi, but brought no relief to the drought-affected areas in the interior.

NEW ZEALAND: DAIRY PRODUCTION UP IN 1991

Preliminary data show New Zealand's 1991 (June 1990/May 1991) milk production was up 3 percent to 342,000 tons (butterfat basis), according to the U.S. agricultural attache in Wellington. Except for one short dry spell, pasture growing weather was good throughout the entire year. The production outlook for 1992 is for a small decline, with butterfat output forecast to be in the 325,000 to 330,000-ton range. The Dairy Board set the final 1990/91 producer payment at NZ$3.70 per kilogram of butterfat, down sharply from last year's NZ$5.80. Since many processors pay more than the minimum, actual payment to farmers is expected to average near NZ$4.20 per kilogram compared to NZ$6.30 last year. The Dairy Board has announced an initial payment level of NZ$3.70 for the 1991/92 season.

FINLAND: FORESTRY SITUATION

The Finnish forest industry is facing a severe downturn during 1991. The timber harvest is expected to decline by 21 percent to 43.5 million cubic meters (CUM) due to spiraling production costs, excessively high stocks, and a slowdown in the domestic economy. In an effort to liquidate surplus stocks, the various wood product sectors jointly demanded that forest owners lower the 1991 raw material selling prices. The private forest owners refused and countered with a sales boycott, effective April 1, 1991. The boycott reportedly will remain in effect until a satisfactory price agreement can be reached, which, to date, has not occurred.

The projected cutback in 1991 fellings is expected to adversely impact the entire industry. Softwood log production is forecast to decline to a 5-year low of 15.7 million CUM. The 1991 cut of temperate hardwood logs is expected to total only about 1.2 million CUM, down 24 percent from the 1990 volume of nearly 1.6 million CUM. Projected mill production of softwood lumber is not expected to exceed 6.0 million CUM, off 19 percent from a year ago, mainly due to high domestic raw material prices and strong competition in export markets. However, the hardest hit reportedly will be the particleboard industry. The permanent closing of three particleboard mills during 1990 reduced production capacity in this sector by one-third. Current assessments indicate output of particleboard will plummet to 450,000 CUM, potentially the lowest level recorded since 1970.

Production estimates are as follows in 1,000 cubic meters:

	1989	1990	1991 1/
HARVEST	58,730	55,130	43,530
Softwood logs	20,680	19,600	15,740
Temperate hardwood logs	1,640	1,560	1,180
Poles, piles, posts, pitprops	122	120	100
Softwood lumber	7,850	7,400	6,000
Temperate hardwood lumber	68	68	65
Railroad ties/sleepers	35	20	20
Softwood veneer	20	20	20
Temperate hardwood veneer	10	10	10
Softwood plywood	103	90	75
Temperate hardwood plywood	511	510	410
Particleboard	671	526	450

1/ Preliminary.

SWEDEN: FORESTRY SITUATION

The current outlook for the Swedish forest industry indicates that production of wood and most wood products will be below the record 1990 level due to increased competition and uncertainty on world markets. Sweden's 1991 timber cut is forecast at 65.7 million cubic meters (CUM), down 3 percent from a year ago. Softwood log production is expected to drop 4 percent to 22.3 million CUM. Fellings of temperate hardwood logs are forecast at a 10-year low of 700,000 CUM.

Production of softwood lumber and temperate hardwood lumber is expected to plummet 9 percent during 1991, to 10.5 million CUM and 350,000 CUM, respectively. The downturn was precipitated by Germany's heavy fellings of storm-damaged trees during 1990. This action glutted European markets with a surplus of sawnwood at substantially reduced prices. By the end of 1990, Swedish sawmills were confronted with sharply reduced orders from traditional European export markets which were already overstocked and reluctant to maintain trading levels after the onset of the Gulf War. Swedish sawmills were forced to institute immediate production cuts. The situation was further aggravated by projections of a 26-percent reduction in domestic building activity during 1991.

After several structural changes during the 1980's, the Swedish panel products industry, especially the particleboard sector, reduced production capacity to more closely match the needs of the domestic market. Current assessments indicate softwood plywood production will increase for the second consecutive year to 68,000 CUM, marginally above the 1990 volume, but 8 percent below the 1987 record of 74,000 CUM. Production of temperate hardwood plywood is expected to remain stable at 2,000 CUM. Particleboard production is expected to recover to 860,000 CUM based on the success of a new line of high quality products for use in the furniture and joinery industries.

Production estimates are as follows in 1,000 cubic meters:

	1989	1990	1991 1/
HARVEST	67,100	67,500	65,700
Softwood logs	22,500	23,200	22,300
Temperate hardwood logs	750	772	700
Poles, piles, posts, pitprops	42	49	50
Softwood lumber	11,251	11,594	10,500
Temperate hardwood lumber	375	386	350
Railroad ties/sleepers	20	20	20
Softwood plywood	66	67	68
Temperate hardwood plywood	2	2	2
Particleboard	864	843	860

1/ Preliminary.

FEATURE COMMODITY ARTICLES

WORLD OILSEEDS OUTLOOK

Total world oilseeds production for 1991/92 is forecast at a record 220.8 million metric tons, 3.4 million or 2 percent more than last year. Soybeans, cottonseed, rapeseed, and peanuts combined are forecast up 4.1 million tons, but the increase will be partially offset by reduced output of 0.6 million of sunflowerseed and 0.2 million of flaxseed. Foreign output is expected to account for 83 percent of the increase, breaking last year's previous record foreign crop by 2.8 million tons, to 159.7 million. In addition, the United States is expected to have its highest output of oilseeds in over 5 years.

UNITED STATES

Oilseeds production by the United States is pegged at 61.1 million tons, up 0.6 million or 1 percent from 1990/91. Although soybean production is projected to reach only 50.9 million tons, 1.4 million below last year, other oilseeds are expected to increase output this year. Peanuts (up 0.5 million), sunflowerseed (up 0.5 million), and cottonseed (up 0.8 million) are up a combined total of over 1.9 million tons.

FOREIGN OILSEEDS

The expected record 1991 crop of 159.7 million tons of total foreign oilseeds includes increases in soybeans (up 2.3 million tons), rapeseed (up 1.3 million), and cottonseed (up 0.6 million tons) for a total of 4.1 million. These are expected to be offset, however, by estimated declines in sunflowerseed (down 1.1 million), flaxseed (down 0.3 million), and peanut (down 0.1 million) output, holding total foreign oilseed increases to 2.8 million tons or 2 percent over last year. Record total oilseeds output is estimated for Canada, the European Community, China, Indonesia, Pakistan, and Paraguay.

Canada: Canadian oilseeds production is estimated to reach 6.3 million tons in 1991/92, breaking the previous record of 5.9 million set in 1987/88. Boosted by a significant area increase and good growing conditions, rapeseed is estimated at 4.2 million tons, up 0.9 million or 28 percent over last year. Soybeans also are estimated to be up over 1990/91, reaching nearly 1.4 million tons, 4 percent larger than last year. Counterbalancing this rise is an expected drop in the output of flaxseed, sunflowerseed, and peanuts. Flaxseed will lead the decline in production with by 0.3 million tons or 33 percent, due primarily to reduced area.

The European Community (EC): The EC is estimated to slightly surpass last year's total oilseeds production by 0.2 million tons, to a record 13.2 million. While harvested area estimates are down for sunflowers, soybeans, and cotton, an estimated 13 percent increase in rapeseed area will lead to an estimated record rapeseed crop of over 7.0 million tons, 0.9 million over 1990/91. The upward trend of EC oilseed production is a continuing result of support price programs and has not been significantly affected by the initiation of the Guaranteed Minimum Quantity (MGQ) scheme. A new oilseeds price support regime was submitted to the EC ministers for approval in late July, with the expectation that the program will begin in 1992.

Eastern Europe: Total oilseeds production in Eastern Europe for 1991/92 is estimated at 4.2 million tons, 1.5 million tons below the record set in 1986/87 of 5.7 million. All major oilseeds are estimated to fall in both area and output. Sunflowerseed and rapeseed account for 90 percent of all oilseeds produced in Eastern Europe. Poland's 1991/92 rapeseed crop is pegged at 1.2 million tons, down 56,000 tons or 5 percent from last year. Winter rapeseeds suffered only minor losses to adverse cold and reduced snow cover this past season. Yugoslovia's rapeseed and sunflowerseed crops decline by 47 percent and 42 percent, respectively, while Czechoslovakia is forecast to harvest a better-than-average rapeseed and sunflowerseed crop. Hungary and Romania are the largest sunflower producers in Eastern Europe. Harvested area is expected to increase slightly in Hungary and improved yields over last year will likely push output up 4 percent, to 0.7 million tons. Romania, however, is expected to harvest 9 percent less sunflower area than 1990/91. Sunflowerseed production is expected to decline only 550,000 tons or 1 percent, however, due to improved average yield.

USSR: The Soviet Union is expected to harvest its third largest total oilseeds crop this year, estimated at 13.2 million tons. All oilseeds are expected to increase over last year's level. At 6.6 million tons, the 1991/92 sunflowerseed crop will be only marginally above last season, reflecting a slight increase in area. Dry conditions in some sunflower growing regions have stressed plants, but no significant loses are anticipated. Cotton area is expect to decline 10 percent from last year. As a result, cottonseed output is estimated to decline by 7 percent to 4.6 million tons.

Total Asia: Oilseeds production in Asia, including central and southern Asia, is estimated at a record 70.3 million tons, up slightly from 1990/91. China, Indonesia, and Pakistan will likely have record total oilseed crops. While harvested area for all the major oilseeds is expected to increase over last year for the combined region, mixed yield prospects will hold production near last year's level. Reduced production of rapeseed, peanuts, copra, and sunflowerseed will be offset by larger cottonseed, soybeans, and palm kernel harvests.

China: Total oilseeds production in China for 1991/92 is estimated at a record 33.7 million tons. While area is up for all oilseed field crops, average yields are expected to fall short of last season. Peanut production is estimated to be down 9 percent from 1990/91, falling 0.6 million tons to 5.8 million. Output of sunflowerseed, the smallest oilseed crop grown in China, will likely decline from 1.2 million tons to 1.15 million. On the up side, cottonseed production is estimated up 7 percent over last year, to a near record 8.2 million tons. Bolstering production further are slight increases in soybeans and rapeseed production.

India: India is expected to harvest a near record total oilseeds crop of 20.6 million tons, from a record 26.7 million hectares, for 1991/92. An estimated record peanut crop of 7.6 million tons, combined with a 5 percent increase in cottonseed, will not be enough to offset an expected 12 percent decline in rapeseed production. Following last year's excellent yield; the rapeseed harvest is expected to reflect a return to more normal yields. This monsoon season progressed slowly through the northern regions of India, but eventually spread beneficial moisture in time for late planting. The delay in rainfall did, however, increase the risk of reduced output if timely rains fail to replenish soil moisture during September-October.

Pakistan: This year's estimated record 3.8 million tons of oilseeds, 4 percent over 1990/91, can be attributed to an expected 129,000-ton increase in Pakistan's most important oilseed crop, cottonseed. Pakistan produces small amounts of flaxseed, sunflowerseed, peanuts, and soybeans. It also harvests about twice as much rapeseed as the United States, nearly 250,000 tons. Cottonseed accounts for 90 percent of total oilseeds output. A record 2.8 million hectares of cotton is expected to be harvested with a record cottonseed yield slightly higher than last year's 1.21 tons per hectare. Pakistan's cotton crop is not usually dependent upon the monsoon season for moisture as nearly all cotton is irrigated. Reservoirs levels and water supplies are abundant this season as a result of the excellent monsoon conditions of the past two years.

Indonesia: A record 4.3 million tons of oilseeds is estimated for 1991/92, up nearly 0.2 million or 4 percent from 1990/91. A steady upward trend in oilseeds output continues for the islands, with copra and soybeans leading other oilseeds such as peanuts, palm kernel, and a small amount of cottonseed. Soybeans will just surpass copra in output this year with a 4 percent increase over 1990/91 to 1.4 million tons. Peanut and palm kernel output, estimated at 0.9 million tons and 0.6 million, respectively, reflects increases during 1991/92 of 3 and 2 percent, respectively.

South America: South America is forecast to produce 38.3 million tons of oilseeds in 1991/92, up over 5 percent from 1990/91. While sunflowerseed, peanuts, and flaxseed are estimated to decline in Argentina, Brazilian normal soybean yields would cause a net increase in South American total oilseeds production of just under 2.0 million tons.

Brazil: While total Brazilian output, at an estimated 19.1 million tons, is forecast up 12 percent from last year, all the increase is due to an anticipated return to more normal yields and average field abandonment following last season's extremely dry weather. Soybeans, which account for 92 percent of total oilseeds production, are estimated at 17.5 million tons harvested from 10.0 million hectares in 1991/92. The Government's policy of supporting domestic food crops such as corn over soybeans likely will continue for the near future, but a statement recently released by officials outlined their intentions to provide agricultural support to producers much earlier than released last year. Last year, many producers of corn and soybeans alike had little or no available operating funds due to a dearth of credit from either banks or government sources. Many producers remain in arrears for credit used during 1989. The effectiveness of this year's Government policy will have to be compared to the relative corn/soybean price ratio in light of international soybean prices during the

October-December planting period. Weather in the United States has reduced this year's U.S. soybean estimate, and international soybean prices could climb. In response to higher prices, Brazilian soybean producers may increase their planted area above present estimates. This is particularly true in Brazil's center-west region, where producers have few field crop alternatives to soybeans.

Argentina: Total oilseeds production in 1991/92 is forecast to fall by 0.6 million tons from last year's record, to 15.6 million. This would however, be the third largest crop on record. All the major oilseeds are expected to show declines in the upcoming season. Sunflowerseed area is expected to lead the decline with an estimated 0.4 million drop in output from last year, accompanied by a 75,000 ton decline in peanuts, 50,000 in soybeans, 40,000 in cottonseed, and 20,000 in flaxseed. Harvested area is forecast to climb for soybeans (5 percent) and sunflowers (9 percent).

Paraguay: Given normal yields total oilseeds production could reach a record 2.1 million tons. Total oilseeds output has hovered near this level since 1988/89, but below average yields and abandoned area, due to adverse weather, have prevented a record harvest. Harvested soybean area is forecast to climb marginally and, with an average yield, output is expected to reach 1.6 million tons, up 23 percent over last year's disappointing harvest. The cotton harvest also is forecast to improve slightly, providing an additional 75,000 tons of cottonseed, Paraguay's best ever production.

Africa: Total oilseeds production in Africa is forecast at 8.7 million tons in 1991/92, the second largest on record. Oilseed output in Africa is dominated by peanuts (3.9 million tons), cottonseed (2.4 million), and sunflowerseed (1.0 million). An estimated 484,000 tons of soybeans are also forecast for 1991/92, 19 percent over last year. The largest soybean producers are South Africa, Egypt, and Zimbabwe, each accounting for over 100,000 tons, followed by Nigeria and Zambia. Tropical oilseeds account for the remaining oilseeds, particularly palm kernel in Nigeria (270,000 tons or 43 percent of all Africa) and copra from Mozambique, the Cote d'Ivoire and Tanzania.

Nearly all of this year's 3 percent total oilseeds increase over 1990/91 is expected to come from an excellent peanut crop, estimated at slightly under 3.9 million tons, up 5 percent from last year. Peanuts are grown throughout the continent and, with few exceptions, the 1991/92 crop could repeat or exceed last year's harvest. Of special note are the forecast increases in the major peanut producing countries of the Sudan (up 75,000 tons to 0.4 million), Gambia (up 45,000 tons to 120,000), Nigeria (up 30,000 tons to 0.4 million), and Senegal (up 25,000 tons to nearly 0.7 million). Malawi is also forecast to harvest an additional 22,000 tons from last year, to 56,000 tons.

Africa's cottonseed production for 1991/92, while expected to be harvested from 5 percent more area than last year, is projected to increase only slightly. Egypt is the largest cottonseed producer in Africa, with an estimated output of 515,000 tons in 1991/92 (down from 575,000 last year). The next largest cottonseed producers are Mali, with 225,000 tons (up from 200,000 last year), and the Sudan with 190,000 tons (no change from last year). Producers in the range of 130,000 tons or more include the Cote d'Ivoire (157,000 tons), Tanzania (150,000 tons), and South Africa (130,000 tons).

Sunfloverseed production in Africa is estimated at 1.0 million million, a marginal decline from 1990/91. Approximately 57 percent of all Africa's sunfloverseeds are produced by South Africa, followed by Morocco with 19 percent. While Morocco is estimated to increase both its harvested area and seed output by 30,000 tons over last year, South Africa is expected to harvest 9 percent fewer hectares for a sunfloverseed collection 75,000 tons below 1990/91, to 575,000 tons.

The Middle East: Middle East total oilseeds production is forecast to be 2.3 million tons in 1991/92, down 15 percent from 1990/91 and the lowest level since 1982/83. With the exception of peanuts, a relatively minor oilseed in this region, production is expected to be down for oilseeds. Cottonseed is the major oilseed in the Middle East, accounting for over 55 percent of production. Sunfloverseeds, soybeans, and peanuts account for the majority of the remaining oilseeds with 31 percent, 8 percent, and 5 percent of total output, respectively.

Cottonseed production is forecast at 1.3 million tons in 1991/92, down 0.2 million or 14 percent from last year. While nearly every Middle East country is estimated to have reduced cotton area slightly in 1991/92, Turkey is expected to lower harvested area by 47,000 hectares or 7 percent. Turkey normally produces over 60 percent of the region's cottonseed and one-half of all oilseeds. In 1991/92, Turkey is expected to produce 0.8 million tons of cottonseed, down 130,000 tons. Other important cottonseed producers include Syria with 20 percent of total regional production and Iran with 13 percent.

Sunfloverseeds are produced mainly by Turkey. An estimated 650,000 tons of the 1991/92 Middle East sunfloverseed harvest of 702,000 tons will come from Turkey. During 1991/92, Turkey is expected to reduce harvested area by 150,000 hectares to 550,000, a 21 percent drop from last year. Lower area, combined with poor yields, will push the estimated production in Turkey down 23 percent, from 850,000 tons to 650,000.

Turkey also produces 60 percent the all peanuts grown in the Middle East. In 1991/92, peanut production is expected to reach 70,000 tons in Turkey, up from 50,000 in 1990/91 and reversing two years of declining output. Along with a 5,000 ton increase in peanut production in Syria, to 25,000 tons, total Middle East peanut production is expected to reach 115,000 tons in 1991/92.

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TABLE 9

Total Oilseeds Harvested Area and Production 1/

Year	World Total	Total Foreign	North America			Europe			USSR	Asia						South America				All Africa	Middle East
			United States	Canada	Mexico	EC-12	Other Europe	Eastern Europe		China	India	Indo-nesia	Paki-stan	Thai-land	Other Asia	Argen-tina	Brazil	Para-guay	Other S.A.		
Area Harvested (million hectares)																					
79/80	131.40	94.58	36.82	4.78	0.83	1.69	0.21	2.30	9.49	16.96	20.84	1.25	2.49	0.31	2.06	5.74	11.09	0.64	0.92	10.45	1.76
80/81	127.77	92.66	35.12	3.05	0.59	1.99	0.25	2.48	9.64	18.20	20.92	1.33	2.59	0.35	2.16	4.25	10.77	0.72	0.75	10.09	1.84
81/82	131.11	96.35	34.76	2.27	0.81	2.29	0.25	2.46	9.38	20.52	22.61	1.09	2.69	0.39	2.36	4.97	10.57	0.73	0.60	9.88	1.82
82/83	131.84	97.08	34.77	2.85	0.62	2.61	0.26	2.33	9.54	21.60	21.55	1.16	2.75	0.33	2.29	5.53	10.47	0.63	0.39	9.76	1.81
83/84	129.93	99.62	30.31	3.18	0.66	3.02	0.25	2.30	9.62	20.25	22.15	1.41	2.64	0.38	2.53	6.29	11.55	0.76	0.51	9.57	1.84
84/85	137.81	104.53	33.29	4.29	0.73	3.34	0.25	2.52	9.30	21.06	22.01	1.43	2.68	0.39	2.73	6.94	12.77	0.99	0.68	9.45	2.04
85/86	136.62	105.57	31.05	4.00	0.65	3.91	0.26	2.69	9.33	22.14	22.14	1.52	2.82	0.45	2.72	7.54	11.79	0.93	0.83	8.98	2.02
86/87	132.70	103.99	28.71	3.81	0.55	4.20	0.28	2.81	9.27	21.88	21.32	1.45	2.94	0.46	2.64	6.62	11.58	0.84	0.77	9.93	1.97
87/88	140.31	111.57	28.74	3.76	0.73	5.24	0.30	2.86	9.94	22.43	22.28	1.67	2.96	0.49	2.80	7.68	13.18	1.07	0.91	10.41	2.11
88/89	145.82	116.22	29.60	4.75	0.50	5.16	0.32	2.78	10.12	22.33	24.74	1.81	2.95	0.58	2.69	7.39	14.38	1.34	1.13	10.46	2.16
89/90	146.88	117.44	29.44	4.10	0.76	5.01	0.34	2.95	10.10	21.93	25.76	1.84	3.02	0.68	2.63	9.08	13.81	1.53	1.06	9.97	2.31
90/91	144.93	115.70	29.23	3.87	0.56	5.86	0.33	2.48	9.94	22.35	26.00	1.88	3.13	0.57	2.66	8.46	11.85	1.48	1.03	10.38	2.11
91/92f	149.93	118.73	31.21	4.40	0.64	5.67	0.33	2.28	9.91	23.78	26.65	1.93	3.23	0.59	2.66	8.83	12.20	1.50	1.05	10.63	1.85
Production (million metric tons)																					
79/80	169.57	97.39	72.18	5.10	1.46	2.50	0.36	3.51	10.56	16.78	11.01	2.72	1.74	0.38	4.64	6.67	16.78	0.74	1.06	8.00	2.17
80/81	154.92	99.00	55.92	3.78	1.11	3.56	0.43	3.71	10.44	19.44	11.02	2.92	1.75	0.40	5.02	5.79	16.67	0.82	0.85	7.84	2.27
81/82	169.15	105.18	63.96	3.09	1.43	3.60	0.41	3.74	10.64	23.59	14.04	2.61	1.83	0.42	5.41	7.30	14.35	0.81	0.74	7.79	2.17
82/83	177.98	109.83	68.15	3.92	1.04	4.80	0.48	3.76	11.17	26.01	11.97	2.60	2.01	0.38	5.39	7.84	16.21	0.70	0.52	7.75	2.26
83/84	165.00	114.57	50.43	3.84	1.16	4.86	0.48	3.71	9.93	27.22	14.00	3.00	1.32	0.45	4.89	10.52	16.77	0.77	0.64	7.26	2.48
84/85	191.05	131.86	59.19	5.12	1.19	6.59	0.49	4.46	10.06	31.06	15.10	3.15	2.34	0.58	6.10	11.34	20.39	1.26	0.88	7.52	2.59
85/86	196.16	130.73	65.43	5.49	1.26	7.63	0.48	4.31	11.10	31.56	13.51	3.28	2.78	0.63	7.08	12.52	15.74	0.84	1.21	7.33	2.49
86/87	194.90	135.40	59.50	5.81	1.10	8.75	0.55	5.67	11.66	30.94	13.66	3.22	2.97	0.66	6.47	10.83	18.60	1.15	1.05	8.32	2.68
87/88	210.57	149.56	61.01	5.90	1.38	12.77	0.50	4.95	12.57	33.70	14.74	3.56	3.24	0.65	6.35	13.95	19.76	1.45	1.28	8.71	2.65
88/89	204.15	153.81	50.34	5.89	1.19	11.89	0.59	4.66	13.37	30.62	19.70	3.84	3.22	0.90	6.30	10.72	24.58	2.01	1.52	8.38	3.09
89/90	214.04	154.75	59.29	4.88	1.60	11.45	0.73	5.21	13.78	28.53	19.61	4.11	3.26	1.00	6.97	15.84	21.79	2.00	1.36	8.25	3.07
90/91	217.44	156.91	60.53	5.62	1.19	13.04	0.69	4.31	13.03	33.59	20.75	4.19	3.65	0.81	7.07	16.15	16.98	1.71	1.49	8.38	2.71
91/92f	220.80	159.68	61.12	6.28	1.28	13.24	0.72	4.20	13.18	33.71	20.56	4.34	3.78	0.85	7.04	15.56	19.08	2.09	1.58	8.66	2.30

1/ Soybeans, cottonseed, peanuts (in-shell basis), sunflowerseed, rapeseed, flaxseed, palm kernel, and copra.

= Indicates largest figure for years shown.

AUGUST 1991

Production Estimates & Crop Assessment Division, FAS, USDA

EC-12 OILSEED PRODUCTION OUTLOOK

Total European Community (EC) oilseed production for 1991/92 is estimated at a record 13.2 million tons. Total oilseed area declined nearly 4 percent from 1990 as farmers shifted to grain crops following last year's drought in northern Europe. With the exception of the Iberian Peninsula, this spring's favorable weather boosted estimated total yields slightly above last year. Total area and yield are estimated to be the second highest on record. Even though the EC has a price support regime intended to stabilize oilseed production, total output continues to grow along a trend line established in the early 1980's.

Rapeseed: EC-12 rapeseed production is estimated at a record 7.1 million tons, up 0.9 million or 14 percent from last year. Rapeseed production accounts for 46 percent of the total EC oilseed crop and has increased at an annual rate of 30 percent over the past 10 years. Harvested area is estimated at a record 2.4 million hectares, up 0.3 million or 12 percent from last year. Harvested area has doubled since the early 1980's. With unification, Germany now leads France in rapeseed production with 39 percent of the total EC output versus 28 percent from France. The United Kingdom and Denmark contribute 19 and 12 percent, respectively.

EC harvested area this season is forecast to increase for several complementary reasons. In addition to the relative profitability of rapeseed in rotation with wheat this year, favorable planting weather boosted sown area. Also, winter rapeseed plantings were reported to have increased at the expense of spring rapeseed, not only because of higher profits but also due to environmental legislation to reduce nitrate wash-out during the winter. In Denmark, environmental legislation requires that 65 percent of arable land be covered during the winter period.

Germany, Denmark, and the United Kingdom are expected to produce record crops, while France is seen producing its second largest harvest. After a mild winter, late frosts hit Europe in early May, causing only limited damage and are not expected to affect the harvest. However, in central-eastern France, abnormally dry and cold weather in recent months has been the principal yield limiting factor this growing season.

Sunflowerseed: EC sunflowerseed production during 1991 is estimated at 3.8 million tons, down 0.3 million or 8 percent from last year's record. Sunflowerseed production accounts for 28 percent of the total EC oilseed crop and has increased significantly over the past 10 years. Harvested area is estimated at 2.3 million hectares, down 0.3 million or 12 percent from last year's record. Harvested area has more than doubled since 1980. France and Spain account for about 87 percent of the EC sunflowerseed production.

Although France and Spain harvest approximately the same area, France produces twice the amount of Spain. Spain's arid climate reduces yield to half that of France. This year, Spain's area was reduced from 1990, reflecting the disappointment of farmers with prices received a year ago and uncertainties with respect to the final outcome of the 1991/92 EC price package. In Spain, production is estimated to be lower as the spring weather was dry in the major producing areas such as Andalusia. In France, farmers are seen returning to

corn, after last year's drought prevented normal corn plantings. France is expected to return to near average sunflowerseed production based on normal yields. The 1990 drought cut sunflower yields by 11 percent. This year's sunflowerseed harvest could surpass present estimates if favorable weather continues.

Soybeans: EC soybean production is estimated at 1.8 million tons, down 0.4 million or 16 percent from last year's second largest harvest. Soybean production accounts for 14 percent of the total EC oilseed crop. Harvested area is estimated at 0.6 million hectares, down 0.1 million or 17 percent from last year's record. Harvested area has increased by a factor of 30 from 10 years ago. Italy produces 86 percent of the total EC soybean output.

Italian soybean plantings were virtually nonexistent in the early 1980's. Fostered by high EC subsidies and a generally depressed grain market, soybean area has been expanding rapidly. Soybean area in 1991 is expected to be lower than last year as the progressive recovery of corn prices during 1990/91 encouraged farmers to plant corn. The reduction should affect only the single crop, while the double crop share of soybeans is seen increasing to one-third of the total soybean area, compared to one-fourth of last year's area. Soybeans are grown almost exclusively in the Po Valley.

Production in Italy is estimated to be lower than last year as area declined significantly. Since the majority of the soybeans are irrigated, yields vary only slightly from year to year. This year's spring weather generally was cool and wet, but as summer arrived, favorable weather prevailed. Soybean production accounts for over 80 percent of Italy's total oilseed output.

A Changing Support Price Regime

This will be the final year during which the present oilseeds support price regime will operate. The price package adopted for 1991 by the EC Council will reduce oilseeds support levels by 1.5 percent and lower the premium for double-low rapeseed varieties from 2.5 ECU to 1.25 ECU per 100 kilograms. These two measures will lower the support price by about 5 percent from the previous year. Additional price reductions are expected in October once the overall EC crop estimate is determined and the price supports are discounted to reflect the Guaranteed Minimum Quantity (MGQ) levels. Given the volume of the estimated rapeseed crop this season, the additional price reduction under the MGQ will likely be substantial. The target price for rapeseed may be adjusted down by 30 percent or more, and down by 19 percent for soybeans. No additional adjustment for sunflowerseed is anticipated since output is expected to be below the MGQ.

In late July, the EC Commission submitted a new oilseeds price support plan to the EC Council of Ministers and the European parliaments. The present regime was found by the GATT to be inconsistent with the EC's GATT obligations. The new plan is expected to become effective with the 1992 rapeseed, soybeans, and sunflowerseed harvests (winter rapeseed 1991/92 crop, spring rapeseed 1992/93, and the soybean and sunflowerseed 1992/93 crop). The new plan provides producers with direct support payments based on area rather than EC overall production by commodity. The base area for establishing support is above 5.7 million hectares for all oilseeds combined, just below the record 5.9 million set in 1990/91. Per hectare payments will be set using ECU's per metric ton for areas with a predetermined Average Community Yield. Premiums and discounts will be determined for regional yield variations and payments will be made directly to producers rather than through the crushing industry as under the present regime. The Commission proposal is subject to the EC Council's approval, expected by October. To date, there has been mixed reaction from the individual countries on whether or not to accept the proposal.

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TABLE 10

European Community Oilseed Production (1,000 mt and hectares)

	1975/76	1976/77	1977/78	1978/79	1979/80	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92
Rapeseed																	
AREA HARVESTED:																	
Belgium-Luxembourg	1	0	1	2	2	2	1	5	4	5	2	3	5	4	5	7	7
Denmark	72	44	39	47	65	103	132	152	162	191	217	227	250	199	231	270	295
France	261	282	275	253	223	400	469	476	463	430	461	388	740	869	633	688	686
Germany 1/	222	225	230	245	240	263	279	310	356	388	411	456	573	532	576	725	925
Ireland	0	0	0	1	0	1	2	3	4	4	4	7	4	4	4	5	5
Italy	1	1	1	1	1	1	1	0	1	2	6	23	28	23	16	17	16
Netherlands	14	12	11	10	7	8	11	11	13	13	10	6	10	7	6	8	7
Spain	0	2	4	4	8	8	25	19	16	10	9	9	8	9	12	24	12
United Kingdom	39	48	55	64	74	92	125	174	222	269	296	299	388	340	323	390	450
Total =	610	614	616	627	620	878	1,045	1,150	1,241	1,312	1,416	1,418	2,006	1,987	1,806	2,134	2,403
PRODUCTION:																	
Belgium-Luxembourg	2	0	1	2	2	2	1	10	10	11	6	8	15	13	15	22	22
Denmark	131	81	77	91	150	225	290	335	309	474	544	618	556	504	655	793	850
France	474	536	388	568	510	1,103	990	1,148	906	1,304	1,340	1,071	2,645	2,302	1,748	1,930	1,989
Germany 1/	562	542	590	649	522	687	648	843	859	967	1,184	1,337	1,665	1,640	1,880	2,153	2,765
Ireland	0	0	0	1	0	1	2	5	9	9	6	16	9	9	9	10	10
Italy	3	2	1	2	2	2	2	0	1	5	13	44	68	51	40	44	43
Netherlands	37	34	30	23	18	29	37	33	38	38	31	20	31	24	23	26	25
Spain	0	4	7	7	10	11	14	13	11	11	10	10	10	11	18	30	18
United Kingdom	61	111	142	155	198	300	325	580	565	925	895	940	1,353	1,040	953	1,200	1,350
Total =	1,270	1,310	1,236	1,498	1,412	2,360	2,309	2,967	2,708	3,744	4,029	4,064	6,352	5,594	5,341	6,208	7,072
Soybeans																	
AREA HARVESTED:																	
France	2	1	3	4	17	8	9	9	12	22	28	48	79	92	135	116	85
Germany 1/	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2	4
Greece	0	0	0	0	0	0	0	0	0	0	0	1	2	3	8	7	6
Italy	0	0	0	0	0	0	3	3	25	36	94	232	481	432	477	550	465
Portugal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
Spain	8	4	4	9	9	7	4	3	1	2	2	1	2	7	11	17	14
Total =	10	5	7	13	26	15	16	15	38	60	124	282	564	534	633	693	575
PRODUCTION:																	
France	2	2	4	4	16	14	18	16	25	31	46	85	186	228	300	245	187
Germany 1/	0	0	0	0	0	0	0	0	0	0	0	0	0	0	5	5	10
Greece	0	0	0	0	0	0	0	0	0	0	0	3	4	6	26	22	25
Italy	0	0	0	0	0	0	9	9	62	110	286	806	1,589	1,408	1,624	1,850	1,550
Portugal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
Spain	14	6	8	17	15	14	6	5	2	4	5	2	4	13	27	42	35
Total =	16	8	12	21	31	28	33	30	89	145	337	896	1,783	1,655	1,982	2,165	1,808

Continued

TABLE 10 (Continued)

European Community Oilseed Production (1,000 mt and hectares)

	1975/76	1976/77	1977/78	1978/79	1979/80	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92
Sunflowerseed																	
AREA HARVESTED:																	
France	61	45	38	39	83	98	155	283	416	476	591	849	965	951	907	1,135	1,023
Germany 1/	0	0	0	0	0	0	0	0	0	0	0	2	8	10	14	18	30
Greece	2	2	2	2	2	3	3	4	9	42	80	79	90	42	26	18	15
Italy	25	25	31	23	34	32	43	51	72	83	94	104	200	165	134	146	125
Portugal	12	15	10	19	23	25	23	20	25	38	40	44	43	75	66	50	60
Spain	792	507	545	584	638	668	750	870	950	1,007	1,215	1,070	994	921	977	1,180	1,000
Total =	892	594	626	667	780	826	974	1,228	1,472	1,646	2,020	2,148	2,300	2,164	2,124	2,547	2,253
PRODUCTION:																	
France	99	62	69	76	159	227	398	650	828	958	1,477	1,902	2,508	2,335	2,125	2,370	2,200
Germany 1/	0	0	0	0	0	0	0	0	0	0	0	4	24	30	45	55	90
Greece	2	2	2	2	2	5	4	8	20	67	163	164	145	75	53	29	36
Italy	46	50	51	42	55	57	86	91	131	146	162	255	450	365	340	301	275
Portugal	8	9	7	15	12	23	8	13	28	28	29	33	28	58	45	34	50
Spain	416	312	388	470	504	495	405	750	750	1,100	990	920	1,006	1,123	929	1,300	1,100
Total =	571	435	517	605	732	807	901	1,512	1,757	2,299	2,821	3,278	4,161	3,986	3,537	4,089	3,751
Other Oilseeds 2/																	
AREA HARVESTED:																	
Belgium-Luxembourg	9	9	10	7	7	7	6	9	7	10	11	8	10	11	12	12	10
France	26	43	46	54	50	46	30	38	39	47	53	41	47	52	56	55	37
Greece	136	149	183	168	142	141	129	113	168	192	203	205	211	252	288	286	233
Spain	64	58	80	45	52	65	74	51	42	62	66	81	81	136	69	84	81
Italy	9	9	15	14	11	9	9	5	5	5	5	5	4	2	2	2	2
Netherlands	5	5	6	5	4	4	3	4	4	4	4	3	4	5	6	7	8
United Kingdom	0	0	0	0	0	0	0	0	0	0	9	11	8	14	18	37	65
Total =	249	273	340	293	266	272	251	220	265	320	351	354	365	472	451	483	440
PRODUCTION:																	
Belgium-Luxembourg	6	8	7	7	7	6	5	7	6	8	8	6	8	8	7	8	8
France	32	36	43	31	42	35	18	31	22	29	34	24	22	31	30	35	22
Greece	262	238	309	220	174	195	200	140	190	243	278	327	300	400	413	340	340
Spain	93	84	101	71	89	118	128	107	83	113	112	134	131	184	102	121	104
Italy	9	11	13	10	10	9	9	6	6	6	7	3	2	2	2	2	2
Netherlands	5	5	6	5	4	4	4	4	3	4	4	5	5	5	7	8	9
United Kingdom	0	0	0	0	0	0	0	0	0	0	7	8	10	26	30	68	120
Total =	407	382	479	344	326	367	364	295	310	403	450	507	478	656	591	582	613
Total Harvested Area	1,761	1,486	1,589	1,600	1,692	1,991	2,286	2,613	3,016	3,338	3,911	4,202	5,235	5,157	5,014	5,857	5,671
Total Production	2,264	2,135	2,244	2,468	2,501	3,562	3,607	4,804	4,864	6,591	7,637	8,745	12,774	11,891	11,451	13,044	13,244

1/ Data combines former eastern and western Germany. 2/ Includes cottonseed, flaxseed, and peanuts.

August 1991

Production Estimates & Crop Assessment Division, FAS, USDA

FIELD TRIP REPORT ON CHINESE COTTON SITUATION

Personnel from the USDA's Foreign Agricultural Service traveled in the primary cotton producing provinces of China from July 15 through August 3, 1991. Travel through the provinces of Shandong, Hebei, Henan, and Xinjiang focused on cotton cultivation, the current condition and likely 1991/92 production in these provinces. These four provinces account for 65 percent of China's harvested cotton area. The USDA August 1991 estimate of China's 1991/92 cotton production and harvested area stands at 22.0 million 480-pound bales and 6.0 million hectares, respectively.

Shandong

Shandong is the largest cotton producing province, boasting a reported cotton area of 1.467 million hectares for 1991/92. Farmers and Government officials indicated that yields this year are likely to be slightly lower than the 938 kilograms per hectare estimated for 1990/91. The 1991/92 yield most frequently quoted by the provincial agricultural bureau was 825 kilograms per hectare. For the fields visited, cotton plants were in good to excellent condition with numerous bolls on each plant.

Shandong has a favorable climate for cotton with long days and high summer temperatures. There are approximately 200 frost free days. Rainfall averages 22 to 24 inches per year with 70 percent falling from July through September. Little rainfall occurs during the harvest period. Cotton cultivation is centered along the Yellow River and in the western and northern regions of the province.

Half of the cotton area is inter-cropped. The most frequent inter-cropping patterns are: 3 rows of wheat and 1 row of cotton or 4 rows of wheat and 2 rows of cotton. Two types of cotton are produced: spring cotton and summer cotton. Spring cotton is inter-cropped with wheat while the summer type is planted into the stubble after wheat harvest. Farmers plant cotton in 3 ways: direct seeding, seeding into plastic sheets, and transplanting seedlings. All three methods are used for spring cotton, while only direct seeding and transplanting are employed for summer cotton. Approximately 60 percent of the cotton is irrigated in this province.

Spring cotton is planted by April 15, while summer cotton is usually planted around May 20, and both are harvested in the early part of October. Farmers pick the cotton by hand several times during the harvest period and dry the raw cotton for 2 to 3 days in the sun. All cotton is of the upland type.

Hebei

For 1991/92, 920,000 hectares were reportedly sown to cotton, of which 167,000 were inter-cropped. Although the planted area and use of inputs were increased over 1990/91, farmers and Government officials visited said that output may be little changed from a year ago because of poor weather. Much cotton was re-seeded due to wet and cool weather during April and May, while hail storms damaged the crop later in the season. At this time there were no yield estimates available.

New land was brought under cotton cultivation through the efforts of agricultural leaders. Farm leaders at the provincial level worked with producers teaching them new production technology. The central government provided farmers with free plastic sheeting while the provincial government issued interest free loans for irrigation systems. Both the central and provincial governments increased the amount of insecticides and fertilizers allotted to farmers.

Henan

For 1991/92, the area planted to cotton is in excess of 900,000 hectares with average yields estimated at 825 kilograms per hectare. For the fields visited, cotton plants appeared in good to excellent condition with squares, flowers, and bolls on most plants. Producer and Government representatives in the regions visited said that conditions this year are not as good as last year as a minor drought in the northern part of the province slowed crop maturity. This year's production could equal the 1990 crop since the area planted to cotton is reportedly larger. Higher prices are reported to be the incentive for expanded area. Also, cotton offers higher returns that other crops.

Two types of cotton are grown in the province: slow maturing varieties called spring cotton and early maturing varieties known as summer cotton. Spring cotton is usually planted around April 20, with summer cotton planted in the last 10 days of May. Spring cotton is inter-cropped with wheat while summer cotton is planted after the wheat harvest in May. Space is left in the field for spring cotton when the winter wheat is planted in the fall. After the wheat is harvested in early May, summer cotton is planted into the wheat stubble. Both types of cotton are transplanted as seedlings. All cotton varieties are upland types. In Henan, 60 percent of the cotton is irrigated using water supplied by ground wells and a system of canals from the Yellow River.

Both types of cotton are harvested at roughly the same time. Harvest occurs from the last 10 days of September to the middle of October. Cotton is usually picked 7 or 8 times and dried under the sun for 2 to 3 days.

Xinjiang

Xinjiang produces both upland and extra long staple (ELS) cotton: 90 percent of the total output is upland while 10 percent is ELS. Both types are high grade because of long, hot, cloudless days and short nights. The areas of cotton cultivation are located in the northern, eastern, and southern parts of the province. Farmers and Government officials reported that the current growing season is good with sown area said to be 467,000 hectares with average yields estimated at 975 kilograms per hectare. Cotton appears in good to excellent condition with squares, flowers, bolls, and open bolls. However, the majority of plants have squares and flowers.

The province averages around 3 inches of annual rainfall, receiving 7 inches in the north, 1 inch in the east, and 2 inches in the south. Because of the light rainfall, snow melt from the surrounding mountains is used for irrigation. Water is conveyed by underground canals into reservoirs and then is directed by a series of water gates and stone-lined canals. A secondary system of plastic sheet-lined ditches conveys the water to the field where it is lifted, by gasoline pumps, to flood the field. Farmers said little fertilizer is used because the land is highly fertile.

During the April planting season, the crop is usually sown through plastic sheets or is planted and then covered with sheeting. The latter method requires the farmer to cut holes in the plastic as the cotton germinates. The plastic sheets are used to lengthen the growing season by allowing early planting and to conserve soil moisture. The major harvest season is during September and November, although operations may begin in late August and run through December. Cotton is picked 10 to 15 times during the harvest season.

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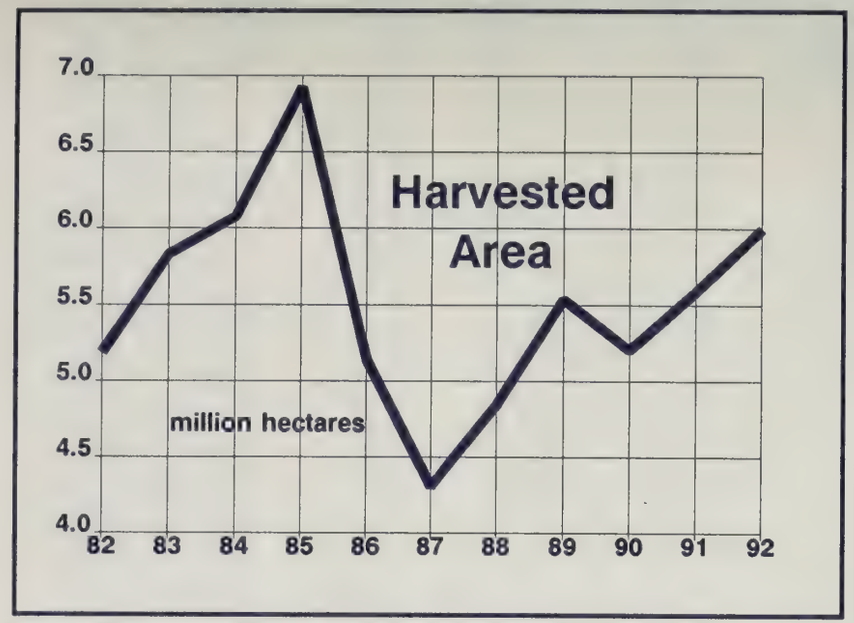
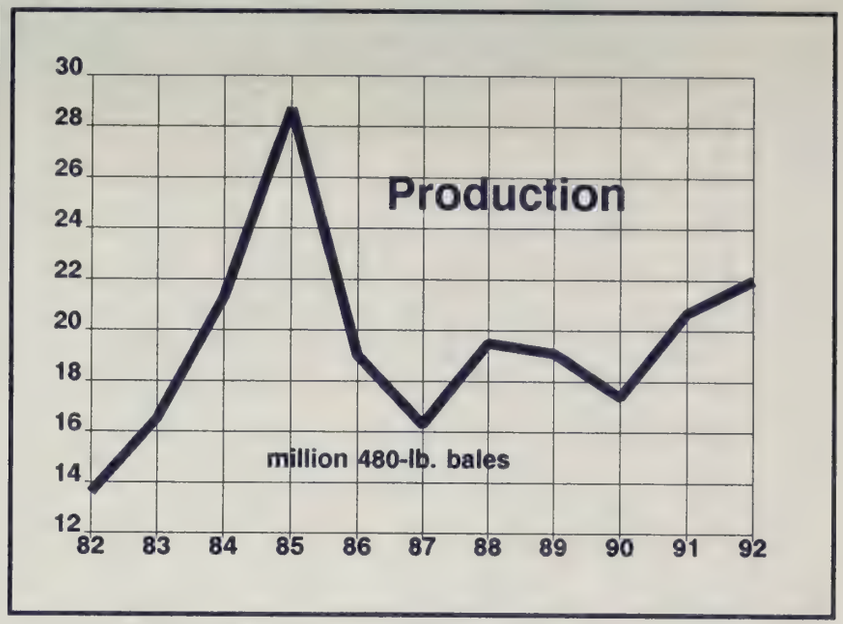
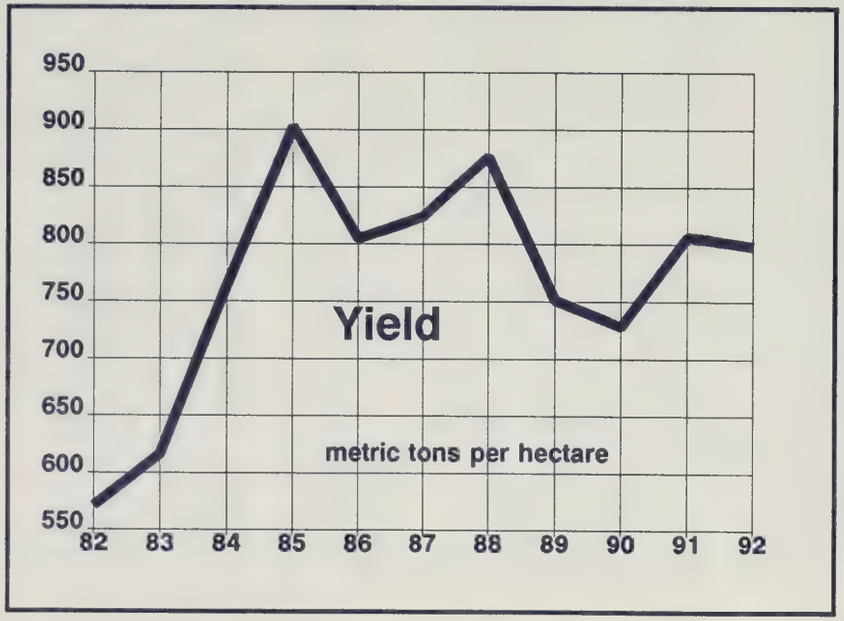
China Cotton Situation







China Cotton Data

	Production (mil.bales)	Area (mil.ha)	Yield (mt/ha)
1981/82	13.2	5.2	571
1982/83	16.5	5.8	616
1983/84	21.3	6.1	763
1984/85	28.7	6.9	903
1985/86	19.0	5.1	805
1986/87	16.3	4.3	824
1987/88	19.5	4.8	827
1988/89	19.1	5.5	751
1989/90	17.4	5.2	728
1990/91	20.7	5.6	807
1991/92	22.0	6.0	798

AUGUST 1991

Production Estimates & Crop Assessment Division, FAS, USDA

CANADIAN WHEAT AND RAPESEED PRODUCTION

USDA Foreign Agricultural Service (FAS) personnel traveled in the major wheat and rapeseed producing areas of the Canadian Prairie Provinces (Manitoba, Saskatchewan, and Alberta) during early August 1991. The following is the result of discussions with producers, elevator managers, trade, industry, and Canadian government officials.

Generally excellent growing conditions in the Prairie Provinces are expected to produce an estimated near record 31.0-million-ton wheat crop and 4.2-million-ton rapeseed crop. May and June rainfall across the prairies was much heavier than last year; however, conditions from mid-July through early August have been drier. Last year, timely rains and beneficial harvest weather produced a record wheat crop and above average yield for rapeseed. With the announcement of Canada's new Gross Revenue Insurance Program (GRIP), producers expanded wheat and rapeseed area more than earlier expected in order to take advantage of the revenue incentives.

Wheat: Wheat production for 1991/92 is estimated at 31.0 million tons, down 2 percent from last year's record. The Prairie Provinces produce nearly 95 percent of Canada's wheat, nearly all of which is spring wheat and durum. Most of Canada's winter wheat is grown in Ontario province and usually comprises less than 5 percent of the total wheat crop. Initial reports indicate that producers in Saskatchewan planted 3 percent more wheat this year than last year, nearly 60 percent of the total Canadian wheat area. Alberta and Manitoba are seen maintaining their area contribution at 22 percent and 15 percent, respectively. Total estimated area this year increased from 14.0 million hectares to 14.1 million as farmers responded to revenue incentives of the GRIP. Even though international wheat prices were low at planting, GRIP probably enticed farmers to summer fallow or to plant additional wheat and/or rapeseed, as opposed to alternative crops. Inputs, such as fertilizer and pesticides, are expected to be used at last year's levels.

Favorable 1991 growing conditions are expected to produce the third largest wheat crop. In Saskatchewan, throughout the growing season, precipitation was much above normal with the exception of the northeast where rainfall was slightly below normal. Most of Saskatchewan's rain came in May and June, thereby promoting vigorous growth. In Manitoba, early planted wheat is now being harvested. Initial reports indicate "disappointing" yields, but producers and elevator managers anticipate higher yields once the "main" harvest begins. In Alberta, wheat appears to be in good condition, although rain is needed to maximize grain filling.

Currently, most of the wheat is at the filling-to-ripening stages and harvest begins in full swing near the end of August. There is some evidence of disease, insect damage, and lodging, but the crop generally is in good condition.

Rapeseed: Rapeseed production for 1991/92 is estimated at a record 4.2 million tons, up 28 percent from last year. The Prairie Provinces produce nearly all of Canada's rapeseed crop. Initial reports indicate that rapeseed area increased 24 percent from last year, to 3.2 million hectares. Saskatchewan producers plant about 43 percent of the total rapeseed area, followed by Alberta at 38 percent, and Manitoba at 16 percent. Again, incentives under GRIP may have made rapeseed an attractive alternative this year.

An increase in area, coupled with generally good weather is expected to boost production. In Saskatchewan, wet weather has caused some low areas to flood. Normally, the low areas are higher yielding; however, above average rainfall may have reduced yields or caused low lying areas to be unharvestable. This condition may be offset by higher yields from the normally drier areas. In Alberta, after a wet spring, rains tapered off in July and additional moisture is now needed to finish the crop. In Manitoba, the rapeseed crop is expected to yield close to last year's level. In 1990/91, Manitoba had the highest yield of the Prairie Provinces.

Presently, rapeseed is at the pod filling stage and harvesting is expected to begin toward the end of August. Wet weather in some areas of Manitoba and Saskatchewan has caused an increased incidence of disease, such as blackleg and sclerotinia. Lodging has also been reported, but not of any significance. Elevator managers and producers indicated that the use of inputs was close to last year's levels.

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TABLE 11

Canadian Wheat: Area, Yield, and Production

	AREA HARVESTED (1,000 Ha.)	YIELD (MT/Ha.)	PRODUCTION (1,000 MT)
1981/82	12,427	2.00	24,803
1982/83	12,554	2.13	26,737
1983/84	13,697	1.93	26,465
1984/85	13,158	1.61	21,188
1985/86	13,729	1.77	24,252
1986/87	14,239	2.20	31,378
1987/88	13,473	1.93	25,950
1988/89	12,987	1.23	15,995
1989/90	13,627	1.80	24,578
1990/91	14,000	2.26	31,700
1991/92	14,100	2.20	31,000

TABLE 12

Canadian Rapeseed: Area, Yield, and Production

	AREA HARVESTED (1,000 Ha.)	YIELD (MT/Ha.)	PRODUCTION (1,000 MT)
1981/82	1,402	1.32	1,849
1982/83	1,777	1.25	2,225
1983/84	1,334	1.12	2,609
1984/85	3,071	1.11	3,412
1985/86	2,783	1.26	3,498
1986/87	2,641	1.43	3,787
1987/88	2,671	1.44	3,847
1988/89	3,672	1.17	4,311
1989/90	2,904	1.07	3,096
1990/91	2,582	1.27	3,281
1991/92	3,200	1.31	4,200

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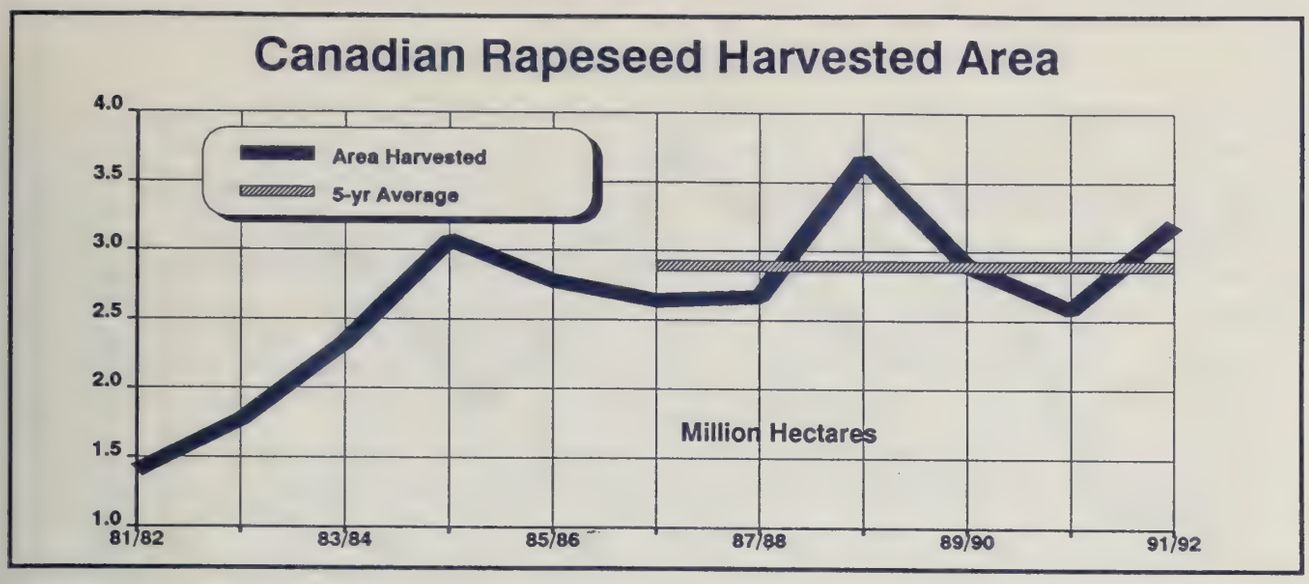
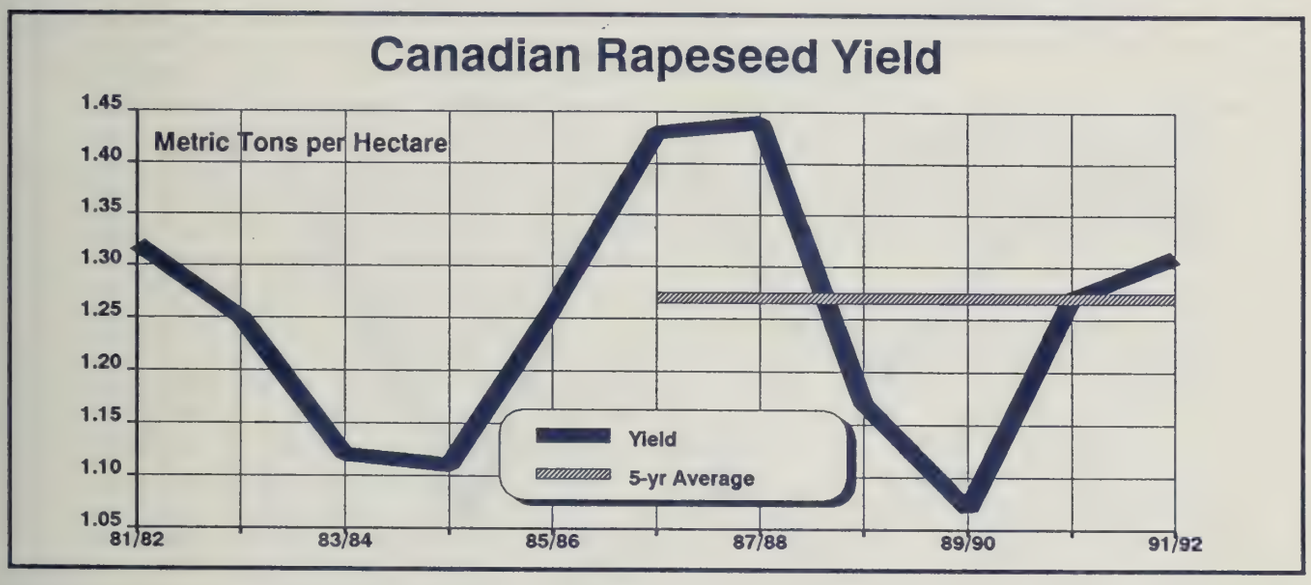
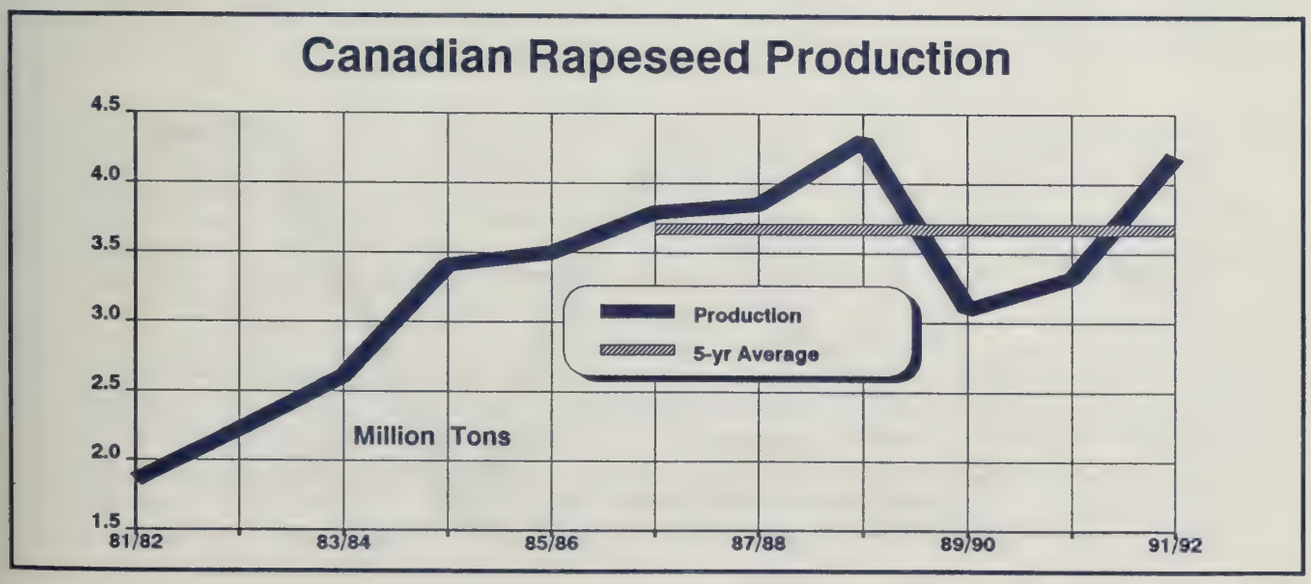
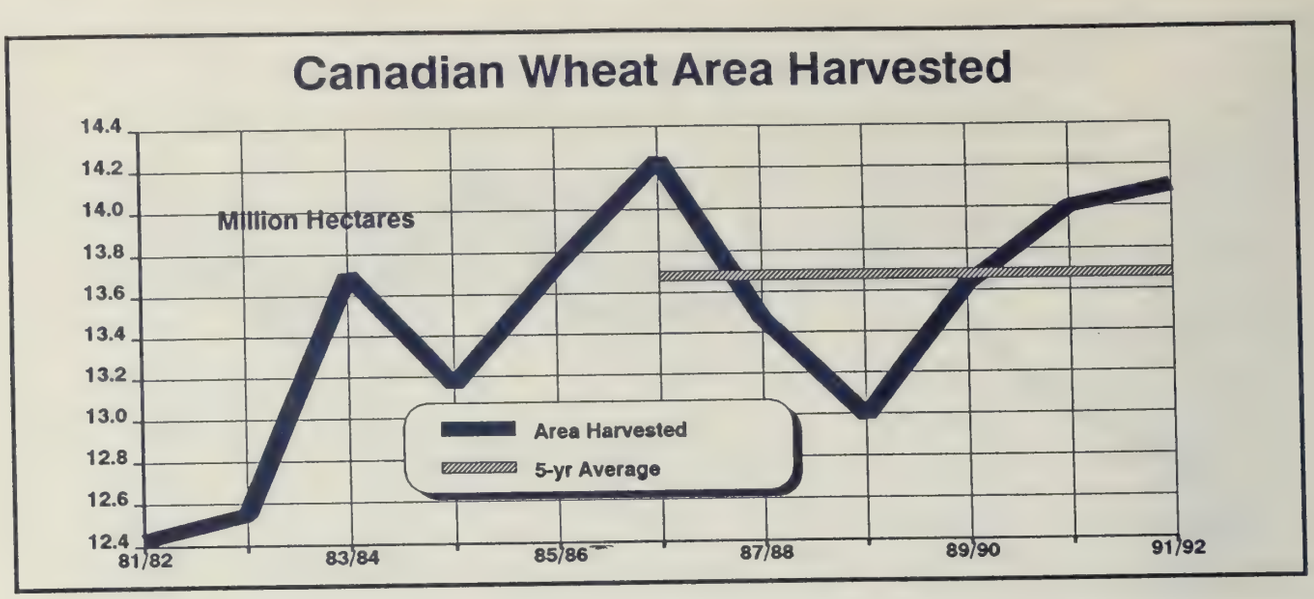
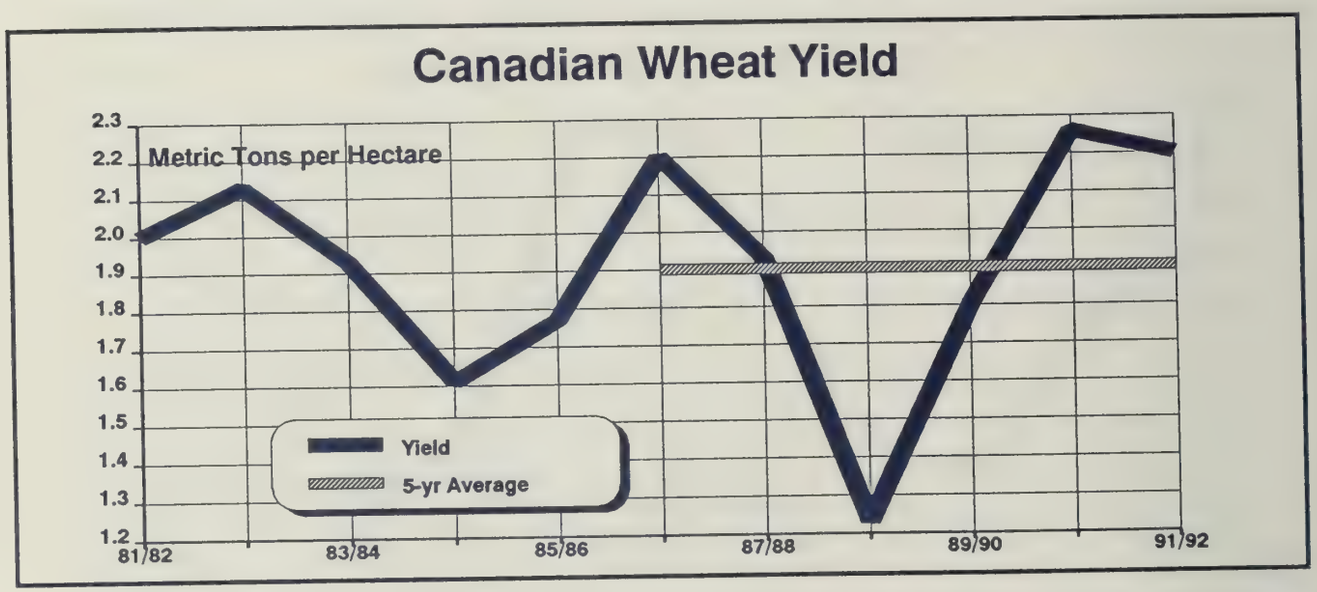
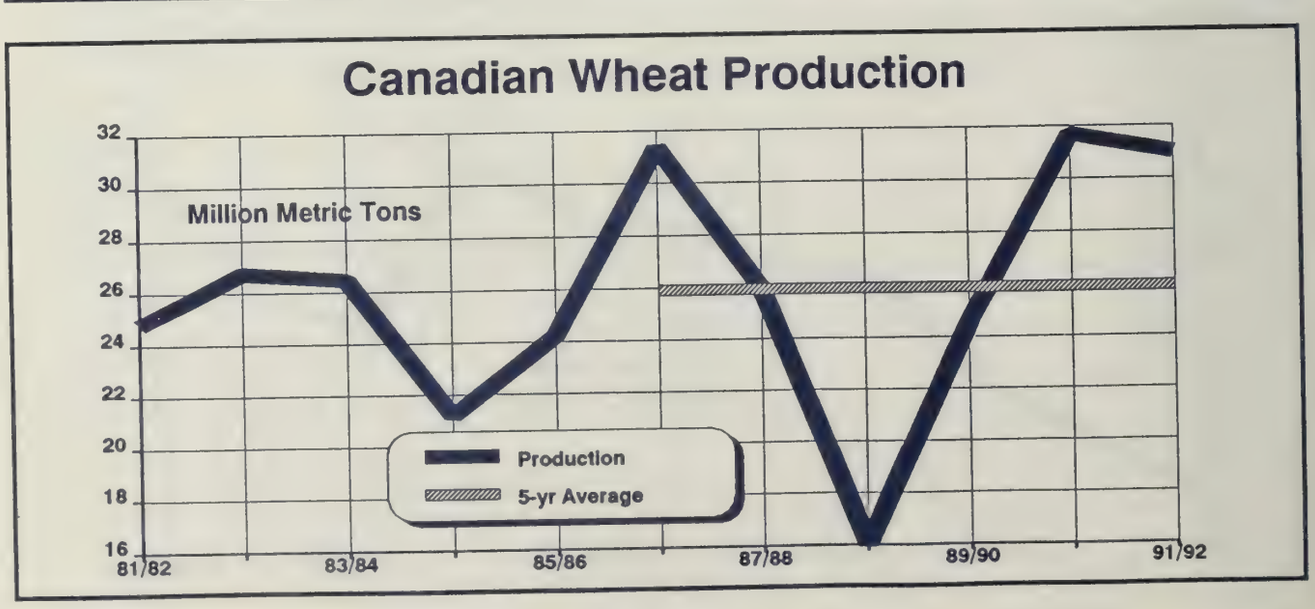

Canadian Rapeseed Harvested Area
Area Harvested
5-yr Average
Million Hectares
4.0
3.5
3.0
2.5
2.0
1.5
1.0
81/82
83/84
85/86
87/88
89/90
91/92


Canadian Rapeseed Yield
Metric Tons per Hectare
Yield
5-yr Average
1.45
1.40
1.35
1.30
1.25
1.20
1.15
1.10
1.05
81/82
83/84
85/86
87/88
89/90
91/92


Canadian Rapeseed Production
Production
5-yr Average
Million Tons
4.5
4.0
3.5
3.0
2.5
2.0
1.5
81/82
83/84
85/86
87/88
89/90
91/92


Canadian Wheat Area Harvested
Million Hectares
14.4
14.2
14.0
13.8
13.6
13.4
13.2
13.0
12.8
12.6
12.4
81/82
83/84
85/86
87/88
89/90
91/92
Area Harvested
5-yr Average


Canadian Wheat Yield
Metric Tons per Hectare
2.3
2.2
2.1
2.0
1.9
1.8
1.7
1.6
1.5
1.4
1.3
1.2
81/82
83/84
85/86
87/88
89/90
91/92
Yield
5-yr Average


Canadian Wheat Production
Million Metric Tons
32
30
28
26
24
22
20
18
16
81/82
83/84
85/86
87/88
89/90
91/92
Production
5-yr Average

WORLD POULTRY MEAT PRODUCTION

World 1/ poultry meat production for 1991/92 is estimated to total 37.6 million tons in 1991, 4 percent above the 1990 level. Output is expected to rise 3 to 4 percent for 1992. Broiler production, the largest component of total poultry meat production, is estimated to total 25.3 million tons in 1991, up 3 percent from 1989. A 3 to 4 percent growth is forecast for 1992. Output of turkey meat in 1991 is estimated at 3.8 million tons, up 3 percent from 1990. Production is expected to rise 3 to 4 percent for 1992. World production of eggs, forecast at 567 billion, is nearly 3 percent above the 1990 level. An increase of about 3 percent is also anticipated for 1992. Strong growth in China accounts for most of the change in egg production at the global level.

In the United States, 1991 broiler production is expected to be 9.0 million tons, up 6 percent from last year as producers take advantage of continuing favorable broiler-feed price relationships. A slower rate of growth is forecast for 1992 as expected higher feed prices reduce producer returns. Canadian broiler production is forecast to grow about 4 percent in 1991 and 1992. Canada's Chicken Marketing Agency's increased allocations to meet rising demand may be too conservative. Much faster growth is forecast for British Columbia which opted not to participate in the national plan. Mexico's 1991 output of broilers is estimated at 750,000 tons, 14 percent above 1990 which in turn was up sharply from 1989. Increased consumer purchasing power and accompanying stronger demand, due in part to the Government's economic program, are given credit for the production increase. However, surpluses have developed and lower prices are forecast to slow the rate of increase for 1992.

In South America, Brazil's 1991 broiler production is estimated at 2.6 million tons, up 10 percent from 1990. A 5-percent increase is forecast for 1992. Brazil's current economic plan has resulted in stronger demand for poultry meat, as it is the least expensive meat. Stronger export demand also is providing some stimulus for the production increase. After falling sharply in 1988 and 1989, broiler production in Argentina recovered slightly in 1990. Stronger growth is expected in 1991 and 1992, although low beef prices continue to limit expansion in the poultry sector. After growing steadily for years and peaking at 375,000 tons in 1987, Venezuelan broiler output in 1990 was down to 224,000 tons with some recovery forecast for 1991 and 1992. Venzuela's poultry industry was put in a sharp downward cycle because the removal of subsidies on imported feed ingredients sharply raised costs, putting producers in a severe cost-price squeeze.

EC broiler production is estimated at 4.6 million tons, up 2 percent from 1990. A slightly slower rate of growth is forecast for 1992. French broiler production in 1991 is estimated at 1 million tons, up 4 percent with slower growth expected in 1992. Both domestic and export demand are growing moderately. Broiler production in the United Kingdom is expected to increase 5 percent in 1991, continuing the moderate expansion that started in 1990. The public health concerns that affected the industry for the past 2 years seem to have been put to rest. Italian broiler production is forecast to show little growth in 1991 and 1992, following 4 percent growth in 1990. Higher output in 1990 caused a moderate drop in producer prices. Consolidation in the Italian broiler industry is giving some cost economies, allowing limited expansion despite tight margins. Broiler production in the Netherlands is expected to expand 6 percent in 1991 and another 1 percent in 1992.

Increased exports to other EC countries are providing some incentive to Dutch producers. Spanish broiler production is forecast at 770,000 tons for both 1991 and 1992, 1 percent above the 1990 level. Broiler output in Germany is estimated to decline in 1991 as the poultry sector of the former German Democratic Republic adjusts to market conditions.

Broiler production in Eastern Europe is expected to decline 2 percent in 1991 as economic restructuring and loss of markets take their toll on the industry. In Hungary, a traditional exporter, rising costs have priced poultry out of both domestic and export markets. Poland's 1991 production of broilers is estimated at 185,000 tons, 3 percent above the low level of 1990. High feed prices on the supply side and plentiful pork on the demand side are likely to limit expansion of the poultry sector in the near future. After declining 6 percent in 1990, broiler output in Yugoslavia is expected to almost recover in 1991 as prospects for profitable production are described as generally favorable. Broiler meat production in the USSR is estimated at 1.75 million tons, down from last year despite a bumper 1990 grain harvest. With the current grain harvest expected to be down, output of broiler meat may slip further in 1992.

Japan's broiler production is forecast at 1.3 million tons for both 1991 and 1992. Despite growing demand, Japanese producers are having difficulty meeting foreign competition. In Thailand, rapid growth in the export market and moderate growth in the domestic market are expected to stimulate 1991 and 1992 production increases of 8 to 10 percent. In Taiwan, the continued rapid production growth in 1990 surpassed market needs and brought lower prices. Production growth slowed for a period of time in late 1990 and early 1991. However, with demand rising, rapid output growth is expected for the remainder of 1991 and 1992.

Output of total poultry meat in China is forecast at 3.6 million tons in 1991 and 4.0 million tons in 1992. Both increases are over 10 percent. Strong demand continues while feed prices remain reasonable, offering good prospects for profitable production. Output of poultry meat for 1991 in the Philippines is estimated at 300,000 tons, up 8 percent, with a similar rate of growth forecast for 1992. Demand is reported to be strong and feed prices are reasonable.

World 1991 turkey meat production is estimated at 3.8 million tons, up 3 percent from 1990, and is expected to grow 3 percent in 1992. U.S. producers, responding to a squeeze on returns following last year's 10 percent increase in feed prices, are expected to produce only 2 percent more turkey meat in 1991. Output is expected to be up 3 percent in 1992. EC production is forecast at 1.3 million tons in both 1991 and 1992. France, the largest EC producer, is forecast to produce 460,000 tons in 1991 and increase 4 percent in 1992. Growth of around 12 percent in 1990 caused prices to decline somewhat, but lower feed prices allowed production to continue to be profitable. Prospects for lower red meat prices may put even more pressure on producers in 1992. After declining in 1990, turkey production in the U.K. is expected to fully recover in 1991. With the current firm prices, many farmers view turkeys as a profitable addition to their operations. Continued expansion in domestic demand, due to both health concerns and lower prices, may have helped the

Italian industry expand in 1990 but lower prices offer little incentive to expand in 1991. Little growth in either production or demand is expected in 1992. Output of turkey meat in Germany is expected to total 170,000 tons in 1991 and 180,000 in 1992. Strong demand for heavy turkeys for further processing is a major factor behind the continued production growth.

World egg production in 1991 is forecast at 567.3 billion pieces, up 3 percent, primarily reflecting significant growth in China. Continued growth is forecast for 1992. In the United States, 1991 output is estimated to grow 1 percent, reflecting some recovery from the 1989 decline. After a year of little growth, Mexico's production of eggs in 1991 has moved sharply higher (9 percent), causing lower prices. Output in 1992 is forecast to increase only 2 percent. Brazil's egg output is up 7 percent in 1991 and is forecast to continue expanding in 1992 by 8 percent. Strong growth is forecast for Argentine egg production in both 1991 and 1992 as the domestic market takes more eggs. Venezuela's 1991 and 1992 egg production may show some recovery from the sharp declines of the recent past. The decline resulted from higher feed prices due to the ending of foreign exchange subsidies for feed inputs.

EC egg production in 1991 is estimated at 85.2 billion, 1 percent below the the 1990 level. Forecasts for 1992 indicate another small decline is likely as EC consumption continues for fall. Egg production for 1991 in Eastern Europe is expected to fall slightly. A declining economy and limited feed supplies are likely to keep output in the USSR in a downward pattern. After years of steady growth, Japan's 1991 and 1992 output of eggs is forecast to show only moderate expansion. China's output of eggs is expected to expand about 8 percent in both 1991 and 1992. Lower priced grain is providing some expansion incentive to meet the rapidly growing demand.

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1/ World refers to the total of selected countries. The number of countries varies by product.

TABLE 13

TOTAL POULTRY MEAT PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric Tons)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 3/
Canada	646	656	659	701	725	750
Mexico	515	592	635	700	800	860
United States	9,105	9,426	10,105	10,878	11,387	11,838
NORTH AMERICA	10,266	10,674	11,399	12,279	12,912	13,448
Guatemala	74	78	83	94	99	102
Argentina	410	370	315	335	350	365
Brazil	1,865	1,997	2,139	2,416	2,643	2,780
Venezuela	413	373	253	225	251	261
SOUTH AMERICA	2,688	2,740	2,707	2,976	3,244	3,406
Belgium-Luxembourg	172	186	179	181	185	188
Denmark	113	117	128	131	134	138
France	1,393	1,434	1,550	1,651	1,700	1,720
Germany	546	576	603	599	600	620
Greece	148	150	154	160	161	161
Ireland	58	59	60	60	60	62
Italy	982	996	1,025	1,069	1,070	1,080
Netherlands	471	485	491	525	550	550
Portugal	197	205	207	213	220	226
Spain	790	829	831	836	840	840
United Kingdom	999	1,056	1,070	1,087	1,130	1,170
EC-12	5,869	6,093	6,298	6,512	6,650	6,755
Austria	75	75	75	78	80	81
Finland	27	28	31	33	36	38
Sweden	46	47	47	47	47	47
Switzerland	29	31	33	33	33	33
OTHER WEST EUROPE	177	181	186	191	196	199
Bulgaria	169	183	198	200	200	200
Czechoslovakia	181	211	216	211	210	210
Hungary	470	465	420	426	405	430
Poland	343	351	348	328	340	352
Romania	425	370	365	425	410	349
Yugoslavia	323	330	320	295	308	315
EAST EUROPE	1,911	1,910	1,867	1,885	1,873	1,856
USSR	3,126	3,184	3,300	3,300	3,250	3,200
Iraq	211	235	225	200	60	80
Israel	157	178	171	173	181	184
Kuwait	19	20	21	18	5	10
Saudi Arabia	236	248	240	265	275	290
Syria	75	80	85	90	90	90
Turkey	221	236	254	269	284	300
UAE	14	14	14	14	14	14
Yemen	70	80	85	87	95	100
MIDDLE EAST	1,003	1,091	1,095	1,116	1,004	1,068

(CONTINUED)

TABLE 13 (Continued)

TOTAL POULTRY MEAT PRODUCTION IN SELECTED COUNTRIES

(1,000 Metric Tons)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 3/
EGYPT	319	279	254	235	225	215
SOUTH AFRICA	523	545	552	563	580	595
INDIA	206	221	289	334	368	400
China	2,040	2,744	2,840	3,229	3,600	4,000
Hong Kong	40	35	34	32	32	31
Japan	1,465	1,471	1,482	1,451	1,435	1,446
Korea, Republic of	144	153	158	175	182	190
Philippines	215	235	263	279	300	324
Singapore	62	63	58	56	58	60
Taiwan	400	418	462	476	490	515
Thailand	464	511	553	595	645	700
OTHER ASIA	4,830	5,630	5,850	6,293	6,742	7,266
Australia	403	401	406	419	440	463
New Zealand	47	50	55	62	60	61
OCEANIA	450	451	461	481	500	524
WORLD 4/	31,442	33,077	34,341	36,259	37,643	39,034

1/ Preliminary. 2/ Estimate. 3/ Forecast. 4/ Total includes 51 countries.

August 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 14

BROILER MEAT PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric Tons)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 3/
Canada	531	537	539	572	595	615
Mexico	395	490	590	660	750	820
United States	7,075	7,342	7,903	8,464	8,951	9,320
NORTH AMERICA	8,001	8,369	9,032	9,696	10,296	10,755
Brazil	1,800	1,947	2,084	2,356	2,580	2,715
Argentina	380	340	300	305	320	335
Venezuela	375	370	252	224	250	260
SOUTH AMERICA	2,555	2,657	2,636	2,885	3,150	3,310
Belgium-Luxembourg	139	150	144	147	152	154
Denmark	98	102	110	116	118	120
France	830	844	898	959	1,000	1,020
Germany	322	327	355	334	315	325
Greece	133	132	136	129	130	132
Ireland	38	39	40	40	40	40
Italy	593	593	608	632	632	640
Netherlands	390	396	406	433	461	465
Portugal	165	169	178	182	188	193
Spain	725	757	772	766	770	770
United Kingdom	760	801	770	798	835	860
EC-12	4,193	4,310	4,417	4,536	4,641	4,719
Austria	60	60	59	60	61	61
Finland	23	24	27	28	31	33
OTHER WEST EUROPE	83	84	86	88	92	94
Czechoslovakia	162	184	162	160	158	158
Hungary	400	368	330	290	260	285
Poland	192	210	210	180	185	190
Romania	330	300	290	400	390	350
Yugoslavia	260	265	258	243	254	260
EAST EUROPE	1,344	1,327	1,250	1,273	1,247	1,243
USSR	1,720	1,760	1,820	1,800	1,750	1,700
Iraq	200	223	214	190	30	40
Israel	101	114	115	121	127	127
Saudi Arabia	236	248	240	263	273	285
Turkey	130	150	180	260	275	290
MIDDLE EAST	667	735	749	834	705	742
EGYPT	259	219	195	185	170	160

(CONTINUED)

TABLE 14 (Continued)

BROILER MEAT PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric Tons)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 3/
SOUTH AFRICA	444	467	480	494	507	525
Hong Kong	29	24	23	22	22	21
Japan	1,340	1,346	1,355	1,332	1,315	1,325
Singapore	52	52	48	45	47	49
Taiwan	286	316	351	362	375	400
Thailand	464	498	538	575	620	670
OTHER ASIA	2,171	2,236	2,315	2,336	2,379	2,465
AUSTRALIA	349	360	365	377	396	417
WORLD 4/	21,786	22,524	23,345	24,504	25,333	26,130

1/ Preliminary. 2/ Estimate. 3/ Forecast. 4/ Includes 39 countries.

August 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 15

TURKEY MEAT PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric Tons)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 3/
Canada	115	119	120	129	130	135
Mexico	25	14	9	8	8	8
United States	1,739	1,796	1,944	2,147	2,185	2,260
NORTH AMERICA	1,879	1,929	2,073	2,284	2,323	2,403
BRAZIL	55	50	55	60	63	65
Belgium-Luxembourg	6	6	6	4	4	4
Denmark	3	2	3	3	3	4
France	308	332	387	432	460	480
Germany	79	96	118	145	170	180
Greece	3	3	3	3	3	3
Ireland	16	16	16	16	16	16
Italy	242	250	257	279	280	285
Netherlands	26	27	27	30	33	34
Portugal	28	28	29	30	31	32
Spain	20	21	21	29	32	33
United Kingdom	200	210	230	223	230	232
EC-12	931	991	1,097	1,194	1,262	1,303
Poland	15	15	15	15	15	15
Yugoslavia	15	15	12	11	12	12
EAST EUROPE	30	30	27	26	27	27
USSR	110	115	120	90	80	80
ISRAEL	46	55	56	52	54	57
WORLD 4/	3,051	3,170	3,428	3,706	3,809	3,935

1/ Preliminary. 2/ Estimate. 3/ Forecast. 4/ Total includes 20 countries.

August 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 16

EGG PRODUCTION IN SELECTED COUNTRIES
(Million Pieces)

COUNTRY/REGION	1987	1988	1989	1990	1/ 1991	2/ 1992 3/
Canada	5,706	5,721	5,719	5,661	5,620	5,575
Mexico	18,039	17,859	17,950	18,040	19,840	20,200
United States	70,418	69,410	67,174	67,919	68,572	68,940
NORTH AMERICA	94,163	92,990	90,843	91,620	94,032	94,715
Argentina	3,300	3,300	3,350	3,900	4,350	4,650
Brazil	15,400	14,850	12,174	13,454	14,390	15,585
Venezuela	2,585	2,700	2,600	1,146	1,381	1,400
SOUTH AMERICA	21,285	20,850	18,124	18,500	20,121	21,635
Belgium-Luxembourg	2,908	2,830	2,724	2,941	2,900	2,850
Denmark	1,316	1,366	1,410	1,409	1,390	1,380
France	14,540	15,300	15,050	14,629	14,800	14,800
Germany	17,995	17,960	17,794	16,800	15,200	15,200
Greece	2,480	2,485	2,507	2,566	2,560	2,570
Ireland	640	640	640	640	640	640
Italy	10,743	11,234	11,223	11,454	11,625	11,700
Netherlands	10,930	10,761	10,660	10,799	11,300	11,300
Portugal	1,587	1,633	1,520	1,590	1,620	1,652
Spain	10,500	10,856	10,140	10,659	10,700	10,700
United Kingdom	13,300	13,500	12,275	12,352	12,485	12,400
EC-12	86,939	88,565	85,943	85,839	85,220	85,192
Austria	1,818	1,757	1,695	1,664	1,697	1,680
Finland	1,370	1,304	1,288	1,232	1,105	1,070
Switzerland	690	708	693	635	640	640
OTHER WEST EUROPE	3,878	3,769	3,676	3,531	3,442	3,390
Bulgaria	2,846	2,850	2,850	2,850	2,850	2,850
Czechoslovakia	5,544	5,596	5,628	5,665	5,400	5,350
Hungary	4,237	4,695	4,250	4,300	4,300	4,300
Poland	7,966	8,220	8,200	7,649	7,800	8,000
Romania	8,000	7,650	7,600	7,100	6,900	6,800
Yugoslavia	4,922	4,972	4,700	4,566	4,680	4,730
EAST EUROPE	33,515	33,983	33,228	32,130	31,930	32,030
USSR	81,917	85,150	84,600	82,000	81,500	80,000
Iraq	1,482	1,600	1,500	1,300	800	1,000
Israel	1,674	1,902	1,898	1,843	1,877	1,970
Saudi Arabia	2,071	2,765	2,800	2,900	2,985	3,060
Turkey	6,100	6,200	7,200	7,500	7,800	8,100

(CONTINUED)

August 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 16 (Continued)

EGG PRODUCTION IN SELECTED COUNTRIES
(Million Pieces)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 3/
MIDDLE EAST	11,327	12,467	13,398	13,543	13,462	14,130
Algeria	2,875	3,200	3,400	3,470	3,600	3,650
Egypt	3,060	2,840	3,000	3,200	2,950	2,950
NORTH AFRICA	5,935	6,040	6,400	6,670	6,550	6,600
SOUTH AFRICA	3,369	3,723	4,012	4,164	4,216	4,282
China	118,000	139,100	140,900	158,920	171,000	185,000
Hong Kong	44	40	34	34	34	34
Japan	39,567	40,137	40,383	39,850	40,250	40,650
Korea, Republic of	6,574	7,204	6,919	7,145	7,500	7,800
Taiwan	4,298	4,400	4,450	4,500	4,500	4,550
OTHER ASIA	168,483	190,881	192,686	210,449	223,284	238,034
AUSTRALIA	3,210	3,238	3,286	3,468	3,540	3,710
WORLD 4/	514,021	541,656	536,196	551,914	567,297	583,718

1/ Preliminary. 2/ Estimate. 3/ Forecast. 4/ Totals includes 41 countries.

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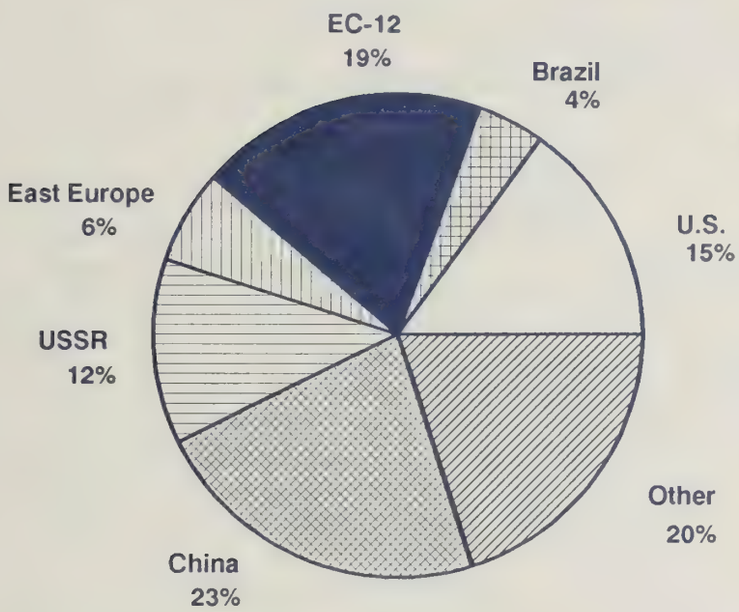
September 1991

World Agricultural Production

World Red Meat Production 1/

1992 Forecast



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1/ Includes carcass-weight-equivalent of beef, veal, pork, sheep, and goat meat.

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Approved by the World Agricultural Outlook Board - USDA

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-258), September 12, 1991.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 382-8888 or by FAX (202) 447-7729.

****
* The next issue of World Agricultural Production will be released at 3 p.m. *
* eastern time on October 11, 1991. *
****

CONVERSION TABLE

Metric Tons to Bushels		Metric Tons to 480-lb. Bales	
		Cotton	= MT*4.592917
Wheat & Soybeans	= MT*36.7437		
Corn, Sorghum, Rye	= MT*39.36825		
Barley	= MT*45.929625		
Oats	= MT*68.894438	Metric Tons to Hundredweight	
		Rice	=MT*22.04622
1 hectare	= 2.471044 acres		
1 kilogram	= 2.204622 pounds		

NOTE: BEGINNING WITH THE MAY EDITION, THIS CIRCULAR SERIES COMBINES DATA FOR THE TERRITORIES FORMERLY KNOWN AS EAST GERMANY (GDR) AND WEST GERMANY (FRG) UNDER THE HEADING GERMANY. LIKEWISE, DATA FOR THE TERRITORY FORMERLY CALLED EAST GERMANY (GDR) ARE INCLUDED IN AGGREGATES FOR THE EUROPEAN COMMUNITY (EC-12) AND EXCLUDED FROM AGGREGATES FOR EASTERN EUROPE. BECAUSE OF THIS, DATA FOR "GERMANY", EASTERN EUROPE, AND THE EUROPEAN COMMUNITY (EC-12) ARE NOT COMPARABLE WITH DATA PUBLISHED IN PRIOR EDITIONS OF THIS CIRCULAR SERIES AND MAY NOT BE COMPARABLE WITH SUCH ESTIMATES FOUND IN OTHER PUBLICATIONS OF THE U.S. DEPARTMENT OF AGRICULTURE.

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PRODUCTION HIGHLIGHTS FOR 1991/92

September 1991

WHEAT: World production for 1991/92 is estimated at 550.9 million tons, up 0.4 million, or less than than 1 percent from last month, but down 7 percent from last year. Total foreign production is estimated at 496.1 million tons, up 0.9 million or only marginally from last month, but down 4 percent from last year. Country highlights are as follows:

- **United States** — Production is estimated at 54.8 million tons, down 0.6 million or 1 percent from last month, and down 27 percent from last year. Spring wheat yields were reduced due to disease and excessive rainfall in Minnesota as well as lower harvest results in the Dakotas.

- **Canada** — Production is estimated at 32.5 million tons, up 1.5 million or 5 percent from last month, but down 1 percent from last year. A recent survey of producers taken by Statistics Canada indicated higher-than-anticipated area. Last year's production was also adjusted upward by 3 percent.

- **EC-12** — Production is estimated at 88.5 million tons, down 0.6 million or 1 percent from last month, but up 4 percent from last season. In Spain, dry weather in the northern areas reduced the estimated yield. French wheat yields increased slightly. In Germany, yields were also reduced.

- **Australia** — Production is estimated at 11.5 million tons, down 0.5 million or 4 percent from last month, and down 25 percent from last year. The decline is the result of a reduction in area and prospective yields due to drought.

- **Syria** — Production is estimated at 2.0 million tons, up 0.5 million tons, or 33 percent from last month, and up 16 percent from last year. Favorable weather in most growing regions improved yield prospects.

COARSE GRAINS: World production for 1991/92 is estimated at 795.1 million tons, down 3.6 million, a slight decrease from last month, and down 5 percent from last year. Total foreign production is estimated at 581.6 million tons, virtually unchanged from last month, but down 4 percent from last year. Country highlights are as follows:

- **United States** — Production is estimated at 213.5 million tons, down 3.6 million or 2 percent from last month and down 7 percent from last year. Corn and sorghum yields were reduced due to dryness in the Corn Belt and Plains. Corn production was reduced by 3.1 million tons while sorghum production was lowered by 0.4 million.

- **Canada** — Production is estimated at 23.6 million tons, down 2.4 million or 9 percent from last month, and down 10 percent from last year. The changes are based on Statistics Canada data that indicated higher area, but lower yield for barley; lower area for oats; lower area and yield for rye; and higher area and yield for mixed grain.

- **EC-12** — Production is estimated at 87.5 million tons, down 2.0 million or 2 percent from last month, but up 4 percent from last season. In Spain, dry weather severely affected yields for barley, oats, and rye. In Germany, barley, oats, and rye were revised downward, while mixed grain and corn were changed upward. In France, barley yields were revised upward while corn area and yields were reduced.

- **Other W. Europe** — Production is estimated at 11.8 million tons, down 0.4 million or 3 percent from last month, and down 13 percent from a year ago. An increase in barley area and production in Finland offset decreases in oats area and production. In Sweden, a reduction in barley and oats area reduced coarse grain production.

- **Indonesia** — Production is estimated at 5.4 million tons, down 0.2 million or 4 percent from last month, but up 2 percent from last year. A prolonged drought in Java reduced the corn estimated harvested area and yield.

- **Eastern Europe** — Production is estimated at 58.8 million tons, up 0.8 million tons or 1 percent from last month, and up 13 percent from last year's drought reduced harvest. The increase is due to improved production prospects for Hungarian barley and rye as well as Polish barley, mixed grains, and oats; which offset decreases in Hungarian corn and Polish rye production.

- **China** — Production is estimated at 103.6 million tons, up 4.2 million or 4 percent from last month, but down 9 percent from last year's revised estimate. The corn production estimates for 1990 and 1991 were increased by 8 and 5 percent, respectively. The sorghum production estimates also were raised by 9 and 8 percent. These changes were based on new information from Chinese sources. Area was down, but yields were higher than anticipated for both crops.

RICE (MILLED-BASIS): World production for 1991/92 is forecast at 345.8 million tons, up 1.5 million or slightly above last month, but down 2 percent from last year's record crop. Total foreign production in 1991/92 is projected at 340.8 million tons, up 1.5 million, or slightly above last month, but down 2 percent from 1990/91. Country highlights are as follows:

- **United States** — Production is estimated at 5.0 million tons, virtually unchanged from last month, but down 3 percent from last year.

- **China** — Production is estimated at 127.4 million tons, up 1.4 million or 1 percent from last month, but down 4 percent from last year's revised record crop. Chinese provincial officials report that the damage to the rice crop from flooding and drought this summer may not be as bad as originally estimated.

- **Vietnam** — Production is estimated 11.9 million tons, up 0.5 million or 4 percent from last month, but down 5 percent from last year. An increase in area and favorable weather are seen offsetting the shortage of fertilizer for the harvested winter-spring crop and brown plant hopper infestations.

- **Burma** — Production is estimated at 7.6 million tons, down 0.5 million or 6 percent from last month, and down 8 percent from last year. Heavy flooding in Irrawaddy and Pegu divisions reduced area.

OILSEEDS: Total world oilseeds production during 1991/92 is forecast at a record 218.7 million tons, down 2.1 million or 1 percent from last month, but up 1 percent from 1990/91. Foreign production during 1991/92 is forecast to be a record 158.9 million tons, 0.8 million or less than 1 percent from last month, but up nearly 2 percent from last year. Total oilseed production in the United States is forecast at 59.7 million tons, down 1.4 million or 2 percent from last month and down 1 percent from last year.

* **Soybeans:** World production for 1991/92 is forecast at 102.0 million tons, down 2.2 million or 2 percent from last month and down 1 percent from last year. Total foreign soybean output is forecast at 52.5 million tons, down 0.8 million from last month or 2 percent, but up 4 percent from 1990/91. Country highlights are as follows:

  - **United States** — Production is estimated at 49.4 million tons, down 1.4 million or 3 percent from last month and down 5 percent from last year. The National Agricultural Statistics Service, USDA, reduced yield projections by nearly 3 percent from last month and down 9 percent from 1990. Above normal temperatures and light rainfall in the Corn Belt States during August reduced yield prospects.

- o **China** — Production is estimated at 10.8 million tons, down 0.7 million or 6 percent from last month and down 2 percent from last year's revised estimate. Official government estimates reduced last year's crop from 11.4 tons to 11.0 million. This month's reduction for 1991/92 is based on lower-than-anticipated planted area and flood damage in Anhui, Jiangsu, and Heilongjiang provinces. Yields are down slightly from last season but still higher than the 5-year average.

- o **Canada** — Production is estimated at 1.2 million tons, down 0.2 million or 9 percent from last month and down 5 percent from last year. Official government estimates from Statistics Canada revised downward both area and yield.

* **Cottonseed:** World production for 1991/92 is forecast at 35.0 million tons, up 0.1 million or less than 1 percent from last month and up 4 percent from last year. Total foreign production is forecast at 28.7 million tons, up marginally from last month and up 2 percent from last year. Country highlights are as follows:

  - o **United States** — Production is estimated at 6.3 million tons, up 0.1 million or 1 percent from last month and up 16 percent from 1990/91. Official estimates by the National Agricultural Statistics Service this month slightly increased expected average yield. Favorable weather conditions in the Delta States has enhanced yield potential.

* **Peanuts:** World production for 1991/92 is forecast at 22.9 million tons, up 0.2 million or 1 percent from last month and up 3 percent from 1990/91. Total foreign production is forecast at 20.6 million tons, up 0.2 million or 1 percent from last month and up nearly 1 percent from last year. Country highlights are as follows:

  - o **United States** — Production is estimated at a record 2.3 million tons, down 34,000 tons or 1 percent from last month, but up 39 percent from 1990/91. The National Agricultural Statistics Service expects average yield to recover from last year's level but reduced this month's estimate by 1 percent. Yield expectations in Georgia were reduced due to disease pressure, and North Carolina's crop suffered from excessive soil moisture in August.

  - o **China** — Production is estimated at 6.0 million tons, up 0.2 million or 3 percent from last month, but down 6 percent from last year. Higher yields are expected because of generally good weather this summer in the important peanut-growing province of Shandong.

* **Sunflowerseed:** World production for 1991/92 is forecast at 21.2 million tons, down 0.2 million or 1 percent from last month and down 4 percent from 1990/91. Total foreign production is forecast at 19.7 million tons, down 0.2 million or 1 percent from last month, and down 6 percent from last year. Country highlights are as follows:

- **United States** — Production is estimated at 1.5 million tons, unchanged from last month, but up 49 percent from last year. Favorable growing conditions characterized early season growth but there has been some deterioration in recent weeks with hot, dry weather. Harvested area is estimated at 1,025,000 hectares, up 37 percent from 1990/91.

- **Soviet Union** — Production is estimated at 6.0 million tons, down 0.6 million or 9 percent from last month and down 9 percent from last year. Hot, dry weather in several important producing regions has significantly lowered yield expectations.

- **EC-12** — Production is estimated at 4.1 million tons, up 0.3 million or 9 percent from last month and up slightly above last year's crop. The increase is attributed to favorable weather in France where production is now expected to be a record. Elsewhere, harvested area in Germany was increased, however, the persistent drought in Spain reduced yield and area estimates.

* **Rapeseed:** World production for 1991/92 is forecast at a record 27.2 million tons, up 0.1 million or one-half percent from last month, and up 6 percent from last year. Total foreign production is forecast at 27.1 million tons, up 0.1 million from last month, but up 6 percent from last year. Country highlights are as follows:

  - **United States** — Production is estimated at 105,000 tons, unchanged from last month, but nearly double that of last year. Area and production data for 1987/88 through the 1991/92 are not survey based estimates but are compiled by the Inter-agency Oilseeds Committee and the World Agricultural Outlook Board. The National Agricultural Statistics Service, USDA, is expected to initiate for release survey based U.S. rapeseed area estimates in January 1992.

  - **EC-12** — Production is estimated at 7.3 million tons, up 0.2 million or 3 percent from last month and up 19 percent from 1990/91. In France, favorable weather throughout the growing season boosted average yield near the record, while Denmark's average yield was reduced by outbreaks of plant disease.

* **Flaxseed:** World production for 1991/92 is forecast at 2.1 million tons, down one-half percent from last month and down 11 percent from last year. While production in the United States is small, this year's output is expected to increase by 18 percent over last year, to 114,000 tons. Total foreign production is pegged at 2.0 million tons, down 10,000 tons from the August estimate, and down 12 percent from last 1990/91. There were no significant country changes this month.

* **Copra:** World production for 1991/92 is forecast at 4.7 million tons, down 0.1 million or 2 percent from last month and down less than 1 percent from last year. Copra production reached a record 5.3 million in 1985/86. There were no significant country changes this month.

* **Palm Kernels:** World production for 1991/92 is forecast at a record 3.5 million tons, down 50,000 tons or 1 percent from last month, but up 5 percent from last year. There were no significant country changes this month.

* **Palm Oil:** World production for 1991/92 is forecast at a record 11.9 million tons, unchanged from last month, but up 8 percent from last year. There were no country changes this month.

COTTON: World cotton production in 1991/92 is estimated at a record 91.6 million bales. This estimate is up 0.5 million bales or 1 percent from last month and up 4.6 million bales or 5 percent from 1990/91. The previous record was 89 million bales harvested in 1984/85. Total foreign production is projected at 73.7 million bales, up 0.2 million bales or less than 1 percent from last month and is a gain of 3 percent over 1990/91. This year's crop is second only to the 1984/85 record of 76 million bales. Country highlights are as follows:

- **United States** — Production is estimated at 17.9 million bales, up 0.2 million bales or 1 percent from last month and up 15 percent above last year. If realized, this will be the largest crop since 1937/38 when output hit 18.9 million bales. The production increase from the August estimate reflects higher yield expectations. The Delta States of Arkansas, Louisiana, Mississippi, Missouri, and Tennessee account for the largest month-to-month change.

- **Australia** — Production is estimated at a near record 1.9 million bales, up 0.2 million bales or 12 percent from last month's estimate, but down 2 percent from last year's record output. The production increase is a reflection of an expected increase in area.

- **Turkey** — Production is estimated at 2.7 million bales, up 0.2 million bales or 7 percent from last month's estimate, but down 10 percent from last year's production level. Cotton continues to make very good progress in virtually all regions under good growing conditions.

- **Greece** — Production is estimated at 0.8 million bales, down 0.1 million or 14 percent from last month and down 14 percent from last year. Reduced area and excessive rain throughout the season have deteriorated production prospects.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	1991/92	1989/90	1990/91	Aug.	Sep.	1989/90	1990/91	Aug.	Sep.
	--Million Acres--			--Million Acres--			--Bushels per Acre--				--Million Bushels--			
All Wheat	76.6	77.3	70.0	62.2	69.4	58.1	32.7	39.5	35.0	34.6	2,037	2,739	2,033	2,013
Winter	55.1	57.0	51.0	41.5	50.0	39.5	35.0	40.7	34.7	34.7	1,455	2,033	1,372	1,372
Other	21.5	20.3	19.0	20.7	19.4	18.6	28.1	36.4	35.6	34.5	582	705	661	641
Rye	2.0	1.6	1.7	0.5	0.4	0.4	28.2	23.3	27.6	27.6	14	10	12	12
Soybeans	60.8	57.8	59.8	59.5	56.5	58.6	32.3	34.0	31.8	31.0	1,924	1,922	1,869	1,817
Corn	72.2	74.2	75.9	64.7	67.0	68.7	116.3	118.5	107.8	106.1	7,525	7,933	7,418	7,295
Sorghum	12.6	10.5	11.0	11.1	9.1	9.7	55.4	62.9	57.9	56.2	615	571	565	548
Barley	9.1	8.2	8.9	8.3	7.5	8.4	48.6	55.9	55.8	55.5	404	419	470	468
Oats	12.1	10.4	8.6	6.9	5.9	5.0	54.3	60.1	52.2	52.2	374	357	260	260
							--Pounds per Acre--				--Million CWT--			
Rice	2.7	2.9	2.9	2.7	2.8	2.8	5,749	5,507	5,544	5,563	154.5	154.9	157.0	157.5
											--Million 480-Pound--			
All Cotton	10.6	12.3	14.1	9.5	11.7	13.4	614	634	630	638	12.2	15.5	17.6	17.9

1/ Except for estimated rye production, all estimates are from the USDA National Agricultural Statistics Service (NASS) for 1989/90, 1990/91 and 1991/92. Production and yield estimates for rye are from the USDA Interagency Commodity Estimates Committee.

TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			USSR	Asia					South America		Selected Other			All Other Countries
			United States	Canada	Mexico	EC-12	Oth. W. Europe	Eastern Europe		China	India	Indo-nesia	Paki-stan	Thai-land	Argen-tina	Brazil	Aus-tralia	South Africa	Turkey	
	—Million Metric Tons—																			
Wheat																				
1989/90	537.6	482.2	55.4	24.6	4.0	82.0	4.4	40.7	92.3	90.8	54.1	0.0	14.4	0.0	10.2	5.6	14.2	2.0	12.5	15.4
1990/91 prel.	593.8	519.3	74.5	32.7	3.9	84.7	5.1	41.1	108.0	98.2	49.7	0.0	14.3	0.0	10.5	3.2	15.4	1.7	15.0	17.9
1991/92 proj.																				
August	550.5	495.2	55.3	31.0	3.5	89.0	4.1	39.4	85.5	94.0	54.0	0.0	14.5	0.0	9.0	3.2	12.0	2.0	16.0	17.7
September	550.9	496.1	54.8	32.5	3.5	88.5	4.0	39.4	85.5	94.0	54.0	0.0	14.5	0.0	9.0	3.2	11.5	2.1	16.0	18.2
Coarse Grains																				
1989/90	800.3	579.0	221.4	23.5	14.1	89.8	12.4	60.2	104.8	93.5	34.6	5.0	2.7	4.3	8.3	22.5	6.8	9.5	7.5	79.4
1990/91 prel.	834.7	604.1	230.6	26.1	18.4	84.1	13.6	52.2	113.3	113.5	35.0	5.3	2.9	4.1	11.2	24.2	6.9	8.5	8.9	76.2
1991/92 proj.																				
August	798.6	581.6	217.1	25.9	16.8	89.5	12.2	58.0	91.5	99.4	32.5	5.6	2.4	4.1	10.1	26.7	7.4	8.6	9.7	81.1
September	795.1	581.6	213.5	23.6	16.8	87.5	11.8	58.8	91.5	103.6	32.5	5.4	2.5	4.0	10.2	26.7	7.3	8.6	9.7	81.1
Rice (Milled)																				
1989/90	344.6	339.5	5.1	0.0	0.4	1.4	0.0	0.1	1.7	126.1	74.1	29.1	3.2	13.3	0.2	4.9	0.7	0.0	0.2	23.2
1990/91 prel.	352.3	347.2	5.1	0.0	0.2	1.6	0.0	0.1	1.6	132.5	75.0	29.4	3.3	11.4	0.2	6.3	0.6	0.0	0.2	23.7
1991/92 proj.																				
August	344.2	339.3	5.0	0.0	0.2	1.5	0.0	0.1	1.7	126.0	73.0	28.9	3.2	13.2	0.2	6.8	0.6	0.0	0.2	23.2
September	345.8	340.8	5.0	0.0	0.2	1.5	0.0	0.1	1.7	127.4	73.0	28.9	3.3	13.2	0.2	6.8	0.8	0.0	0.1	23.1
Total Grains 1/																				
1989/90	1,682.6	1,400.7	281.9	48.0	18.5	173.2	16.8	101.0	198.8	310.4	162.7	34.1	20.4	17.6	18.7	33.0	21.7	11.5	20.2	194.2
1990/91 prel.	1,780.8	1,470.6	310.2	58.8	22.5	170.4	18.7	93.5	222.9	344.2	159.6	34.7	20.4	15.5	22.0	33.7	22.8	10.2	24.1	196.8
1991/92 proj.																				
August	1,693.4	1,416.0	277.4	56.9	20.5	180.0	16.3	97.6	178.7	319.4	159.5	34.5	20.1	17.3	19.3	36.7	20.0	10.6	25.9	202.7
September	1,691.7	1,418.5	273.2	56.1	20.5	177.5	15.8	98.3	178.7	325.0	159.5	34.3	20.3	17.2	19.4	36.7	19.6	10.7	25.9	203.2
Oilseeds 2/																				
1989/90	214.1	154.8	59.3	4.9	1.4	11.5	0.7	5.2	13.8	28.5	19.3	2.2	3.3	0.9	15.8	21.8	0.7	1.0	2.3	21.5
1990/91 prel.	216.8	156.2	60.5	5.6	1.0	13.0	0.7	4.3	13.0	33.2	20.4	2.2	3.6	0.7	16.1	17.0	2.0	1.0	1.9	20.3
1991/92 proj.																				
August	220.8	159.7	61.1	6.3	1.1	13.2	0.7	4.2	12.9	33.7	20.2	2.3	3.8	0.7	15.6	19.1	1.0	1.0	1.6	22.3
September	218.7	158.9	59.7	6.2	1.1	13.7	0.7	4.2	12.3	33.2	20.2	2.3	3.8	0.7	15.5	19.1	1.1	1.0	1.6	22.2
	—Million 480-Pound Bales—																			
Cotton																				
1989/90	80.0	67.8	12.2	0.0	0.8	1.5	0.0	0.1	12.3	17.4	10.6	0.0	6.7	0.1	1.3	3.0	1.4	0.3	2.8	9.5
1990/91 prel.	87.0	71.5	15.5	0.0	0.8	1.4	0.0	0.1	12.0	20.7	9.2	0.0	7.5	0.1	1.3	3.1	1.9	0.2	3.0	10.2
1991/92 proj.																				
August	91.1	73.5	17.6	0.0	1.0	1.3	0.0	0.1	11.3	22.0	10.0	0.0	7.8	0.2	1.3	3.5	1.7	0.3	2.5	10.5
September	91.6	73.7	17.9	0.0	1.0	1.2	0.0	0.1	11.3	22.0	10.0	0.0	7.8	0.2	1.3	3.5	1.9	0.3	2.7	10.5

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains and pulses are 210.9 million tons in 1989/90, 235.0 million in 1990/91, and 190.0 million forecast in 1991/92.
2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also include copra and palm kernels for all countries.
Note: Entries of 0.0 indicate no reported or insignificant production.

TABLE 3

Wheat Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. Aug.	Sept	1989/90	Prel. 1990/91	1991/92 Proj. Aug.	Sept
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	226.3	231.9	223.4	2.38	2.56	2.46	2.47	537.6	593.8	550.5	550.9
United States	25.2	28.1	23.5	2.20	2.66	2.35	2.33	55.4	74.5	55.3	54.8
Total Foreign	201.1	203.8	199.9	2.40	2.55	2.47	2.48	482.2	519.3	495.2	496.1
Maj. Foreign Exporters	45.1	45.8	44.3	2.91	3.13	3.21	3.20	131.0	143.3	141.0	141.5
Argentina	5.5	5.7	4.9	1.86	1.84	1.84	1.84	10.2	10.5	9.0	9.0
Australia	9.0	9.2	7.8	1.58	1.67	1.50	1.47	14.2	15.4	12.0	11.5
Canada	13.6	14.4	14.7	1.80	2.27	2.20	2.21	24.6	32.7	31.0	32.5
EC-12	17.0	16.5	16.9	4.83	5.14	5.24	5.25	82.0	84.7	89.0	88.5
Major Importers	96.4	98.1	95.6	2.48	2.67	2.46	2.46	238.8	261.4	235.3	235.2
Brazil	3.4	3.3	2.4	1.65	0.97	1.33	1.33	5.6	3.2	3.2	3.2
China	29.8	30.8	30.7	3.04	3.19	3.06	3.06	90.8	98.2	94.0	94.0
Eastern Europe	9.8	9.7	9.8	4.14	4.22	4.03	4.02	40.7	41.1	39.4	39.4
Egypt	0.6	0.7	0.8	5.05	5.79	6.40	6.40	3.2	4.3	4.8	4.8
Other N. Africa 1/	4.7	5.1	5.2	1.13	1.11	1.44	1.44	5.3	5.6	7.5	7.5
Japan	0.3	0.3	0.2	3.47	3.66	3.51	3.51	1.0	1.0	0.9	0.9
USSR	47.7	48.2	46.5	1.94	2.24	1.84	1.84	92.3	108.0	85.5	85.5
Other Foreign	59.7	60.0	60.1	1.88	1.91	1.96	1.99	112.4	114.5	118.8	119.4
India	24.1	23.5	24.3	2.24	2.12	2.22	2.22	54.1	49.7	54.0	54.0
Iran	6.8	6.5	6.2	0.81	1.08	1.15	1.15	5.5	7.0	7.1	7.1
Mexico	1.0	1.0	0.9	4.21	4.11	3.98	3.98	4.0	3.9	3.5	3.5
Non-EC W. Europe	0.8	0.9	0.8	5.19	5.48	5.01	5.16	4.4	5.1	4.1	4.0
Pakistan	7.7	7.8	8.0	1.87	1.82	1.82	1.82	14.4	14.3	14.5	14.5
South Africa	1.8	1.6	1.4	1.11	1.10	1.08	1.48	2.0	1.7	2.0	2.1
Turkey	8.7	8.8	8.9	1.44	1.71	1.80	1.80	12.5	15.0	16.0	16.0
Others	8.8	10.0	9.7	1.76	1.79	1.83	1.88	15.4	17.9	17.7	18.2

1/ Algeria, Libya, Morocco, and Tunisia.

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TABLE 4

Coarse Grains Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. Aug.	1991/92 Proj. Sept	1989/90	Prel. 1990/91	1991/92 Proj. Aug.	1991/92 Proj. Sept
TOTAL COARSE GRAINS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World 1/	321.0	319.0	320.4	2.49	2.62	2.49	2.48	800.3	834.7	798.6	795.1
United States	37.0	36.4	37.4	5.98	6.34	5.81	5.71	221.4	230.6	217.1	213.5
Total Foreign	284.0	282.6	283.0	2.04	2.14	2.05	2.06	579.0	604.1	581.6	581.6
Maj. Foreign Exporters	21.3	20.7	21.5	2.46	2.74	2.57	2.50	52.5	56.7	56.0	53.7
Argentina	3.2	3.3	3.6	2.64	3.43	2.88	2.86	8.3	11.2	10.1	10.2
Australia	4.0	4.2	4.8	1.73	1.65	1.53	1.53	6.8	6.9	7.4	7.3
Canada	8.3	7.9	7.6	2.84	3.30	3.31	3.09	23.5	26.1	25.9	23.6
South Africa	4.4	3.8	4.0	2.18	2.20	2.07	2.15	9.5	8.5	8.6	8.6
Thailand	1.6	1.5	1.5	2.78	2.65	2.72	2.65	4.3	4.1	4.1	4.0
Major Importers	103.8	99.8	100.5	2.72	2.84	2.68	2.67	282.9	283.1	269.6	267.9
Eastern Europe	16.5	15.9	16.2	3.66	3.28	3.63	3.63	60.2	52.2	58.0	58.8
EC-12	20.3	19.3	19.0	4.43	4.36	4.66	4.59	89.8	84.1	89.5	87.5
Other W. Europe	3.1	3.0	2.8	3.97	4.49	4.10	4.16	12.4	13.6	12.2	11.8
Mexico	7.5	8.2	8.5	1.88	2.23	1.98	1.98	14.1	18.4	16.8	16.8
USSR	56.0	52.9	53.5	1.87	2.14	1.71	1.71	104.8	113.3	91.5	91.5
Other Major Import. 2/	0.4	0.4	0.4	3.83	3.63	3.70	3.70	1.6	1.5	1.5	1.5
Other Foreign	158.9	162.1	161.0	1.53	1.63	1.59	1.62	243.6	264.3	256.0	260.0
Brazil	12.5	13.5	13.5	1.79	1.79	1.98	1.98	22.5	24.2	26.7	26.7
China	28.2	29.1	28.6	3.31	3.90	3.52	3.62	93.5	113.5	99.4	103.6
India	37.7	38.9	37.6	0.92	0.90	0.86	0.86	34.6	35.0	32.5	32.5
Indonesia	2.7	2.9	3.0	1.85	1.83	1.84	1.83	5.0	5.3	5.6	5.4
Nigeria	9.9	9.5	9.9	0.82	0.67	0.84	0.84	8.1	6.3	8.3	8.3
Philippines	3.6	3.8	3.9	1.24	1.24	1.24	1.24	4.5	4.7	4.9	4.9
Turkey	4.4	4.5	4.5	1.70	1.99	2.17	2.17	7.5	8.9	9.7	9.7
Others	59.8	60.0	60.1	1.14	1.11	1.15	1.15	67.9	66.5	68.9	69.0
BARLEY											
World	74.7	73.8	76.5	2.27	2.53	2.28	2.25	169.8	186.3	174.1	172.5
United States	3.4	3.0	3.4	2.62	3.00	3.00	2.99	8.8	9.1	10.2	10.2
Total Foreign	71.4	70.7	73.1	2.26	2.51	2.25	2.22	161.0	177.2	163.8	162.3
Australia	2.3	2.5	2.8	1.75	1.65	1.50	1.50	4.0	4.2	4.4	4.2
Canada	4.7	4.8	4.9	2.50	2.97	3.09	2.68	11.7	14.2	14.5	13.0
China	3.3	3.3	3.3	1.74	1.73	1.73	1.73	5.7	5.7	5.7	5.7
Eastern Europe	3.6	3.6	3.8	4.03	4.00	3.82	3.82	14.5	14.3	13.8	14.4
EC-12	12.6	12.3	12.0	4.05	4.13	4.18	4.15	51.0	50.8	50.3	49.7
Other W. Europe	1.5	1.5	1.5	3.87	4.35	3.91	3.90	5.9	6.4	5.9	5.9
Turkey	3.4	3.4	3.4	1.46	1.76	2.00	2.00	4.9	6.0	6.8	6.8
USSR	27.6	26.1	28.5	1.75	2.34	1.65	1.65	48.5	61.0	47.0	47.0
Others	12.4	13.3	13.0	1.19	1.11	1.20	1.20	14.8	14.7	15.5	15.6

FOOTNOTES AT END OF TABLE

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Aug.	Sept	1989/90	1990/91	Aug.	Sept
CORN	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	126.1	127.1	129.8	3.66	3.76	3.62	3.61	460.9	477.9	469.4	468.5
United States	26.2	27.1	27.8	7.30	7.44	6.77	6.66	191.2	201.5	188.4	185.3
Total Foreign	99.9	100.0	102.0	2.70	2.76	2.76	2.78	269.7	276.4	281.0	283.2
Maj. Foreign Exporters	6.7	6.4	6.8	2.72	3.05	2.75	2.79	18.2	19.5	19.0	18.9
Argentina	1.7	2.0	2.2	3.06	4.00	3.27	3.27	5.2	7.8	7.2	7.2
South Africa	3.6	3.1	3.3	2.47	2.55	2.35	2.46	8.9	7.9	8.0	8.0
Thailand	1.4	1.4	1.3	2.93	2.81	2.88	2.80	4.1	3.8	3.8	3.7
Major Importers	21.2	19.7	21.3	3.93	3.50	3.90	3.85	83.3	68.8	83.5	82.0
Eastern Europe	7.1	6.5	6.6	4.14	3.26	4.29	4.27	29.2	21.1	28.3	28.2
EC-12	3.9	3.4	3.9	6.91	6.27	7.07	6.95	26.9	21.6	28.3	26.8
Other W. Europe	0.2	0.2	0.2	7.68	7.91	7.88	7.88	1.7	1.8	1.7	1.7
Mexico	5.8	6.6	7.0	1.68	2.14	1.83	1.83	9.8	14.1	12.8	12.8
USSR	4.1	2.8	3.5	3.71	3.50	3.43	3.43	15.3	9.8	12.0	12.0
Other Maj. Import. 2/	0.1	0.1	0.1	4.28	4.10	4.18	4.18	0.5	0.5	0.5	0.5
Other Foreign	72.0	74.0	74.0	2.34	2.54	2.42	2.46	168.2	188.1	178.4	182.3
Brazil	12.1	13.0	13.0	1.80	1.81	2.00	2.00	21.8	23.5	26.0	26.0
Canada	1.0	1.0	1.1	6.36	6.91	6.00	6.06	6.4	7.2	6.6	6.6
China	20.4	21.4	21.0	3.88	4.52	4.08	4.19	78.9	96.8	84.0	88.0
Egypt	0.8	0.8	0.9	5.37	5.43	5.59	5.59	4.5	4.6	4.8	4.8
India	5.9	5.9	5.7	1.61	1.61	1.49	1.49	9.4	9.5	8.5	8.5
Indonesia	2.7	2.9	3.0	1.85	1.83	1.84	1.83	5.0	5.3	5.6	5.4
Philippines	3.6	3.8	3.9	1.24	1.24	1.24	1.24	4.5	4.7	4.9	4.9
Zimbabwe	1.2	1.1	1.2	1.72	1.45	1.67	1.67	2.0	1.6	2.0	2.0
Others	24.3	24.0	24.3	1.47	1.46	1.49	1.49	35.7	34.9	36.1	36.2
SORGHUM											
World	40.6	39.6	39.9	1.35	1.36	1.33	1.33	54.8	53.6	53.1	53.0
United States	4.5	3.7	3.9	3.48	3.95	3.64	3.53	15.6	14.5	14.3	13.9
Total Foreign	36.1	35.9	35.9	1.08	1.09	1.08	1.09	39.1	39.1	38.8	39.1
Argentina	0.7	0.7	0.7	2.86	3.57	2.86	2.86	2.0	2.5	2.0	2.0
Australia	0.4	0.5	0.6	2.27	1.95	2.00	1.92	0.9	0.9	1.0	1.1
China	1.6	1.5	1.5	2.72	3.71	3.17	3.47	4.4	5.7	5.0	5.2
India	14.9	15.0	15.0	0.86	0.83	0.83	0.83	12.9	12.5	12.5	12.5
Mexico	1.3	1.3	1.2	2.88	2.85	2.92	2.92	3.8	3.7	3.5	3.5
Nigeria	4.4	4.4	4.4	0.80	0.64	0.80	0.80	3.5	2.8	3.5	3.5
South Africa	0.2	0.2	0.2	1.11	1.12	1.11	1.11	0.3	0.2	0.3	0.3
Sudan	3.1	3.0	3.0	0.52	0.50	0.50	0.50	1.6	1.5	1.5	1.5
Thailand	0.2	0.2	0.2	1.44	1.39	1.47	1.47	0.2	0.3	0.3	0.3
Others	9.2	9.1	9.2	1.03	1.00	1.01	1.01	9.5	9.1	9.3	9.3

FOOTNOTES AT END OF TABLE

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Aug.	Sept	1989/90	1990/91	Aug.	Sept
OATS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	22.6	21.3	20.4	1.83	1.98	1.79	1.75	41.4	42.3	37.8	35.7
United States	2.8	2.4	2.0	1.95	2.16	1.87	1.87	5.4	5.2	3.8	3.8
Total Foreign	19.8	18.9	18.4	1.82	1.96	1.78	1.74	36.0	37.1	34.0	31.9
USSR	10.8	10.7	10.5	1.57	1.68	1.43	1.43	16.8	18.0	15.0	15.0
Maj. Foreign Exporters	3.7	3.0	3.0	1.97	2.17	2.10	2.03	7.3	6.4	7.2	6.1
Argentina	0.4	0.3	0.4	1.44	1.34	1.29	1.29	0.6	0.4	0.5	0.5
Australia	1.1	1.1	1.3	1.44	1.48	1.38	1.38	1.6	1.6	1.8	1.8
Canada	1.7	1.2	1.0	2.08	2.34	2.44	2.42	3.5	2.9	3.3	2.4
Sweden	0.4	0.4	0.3	3.54	4.42	3.86	4.09	1.5	1.6	1.6	1.4
Other Foreign	5.4	5.3	4.9	2.21	2.41	2.30	2.22	11.9	12.6	11.8	10.9
China	0.6	0.6	0.6	1.20	1.21	1.18	1.18	0.7	0.7	0.7	0.7
Eastern Europe	1.2	1.2	1.2	2.55	2.70	2.56	2.54	3.2	3.3	3.0	3.0
Czechoslovakia	0.1	0.1	0.1	3.24	4.55	4.00	4.00	0.3	0.4	0.4	0.4
Poland	0.8	0.7	0.7	2.72	2.84	2.70	2.67	2.2	2.1	1.9	1.9
EC-12	1.8	1.6	1.4	2.74	3.07	3.02	2.89	4.8	5.1	4.9	4.2
France	0.3	0.2	0.2	3.73	3.86	3.81	3.81	1.0	0.9	0.8	0.8
Germany	0.6	0.6	0.4	3.58	3.93	4.44	4.44	2.0	2.4	2.4	1.7
Finland	0.4	0.5	0.3	3.24	3.67	3.28	3.23	1.4	1.7	1.3	1.1
Norway	0.1	0.1	0.1	3.13	4.58	4.00	4.00	0.4	0.6	0.5	0.5
Others	1.3	1.3	1.2	1.12	1.09	1.11	1.11	1.4	1.4	1.4	1.4
RYE											
World	16.9	16.6	13.5	2.22	2.33	2.22	2.21	37.6	38.7	30.1	29.7
United States	0.2	0.2	0.2	1.77	1.70	1.73	1.73	0.3	0.3	0.3	0.3
Total Foreign	16.7	16.5	13.3	2.23	2.34	2.23	2.21	37.2	38.5	29.8	29.4
USSR	10.7	10.4	8.0	1.87	2.02	1.75	1.75	20.1	21.0	14.0	14.0
Maj. Foreign Exporter											
Canada	0.5	0.4	0.2	1.74	1.68	1.69	1.78	0.9	0.7	0.5	0.4
Other Foreign											
Eastern Europe	3.3	3.4	3.4	2.94	2.88	2.85	2.82	9.7	9.9	9.6	9.5
Hungary	0.1	0.1	0.1	2.06	2.46	2.22	2.40	0.2	0.2	0.2	0.2
Poland	2.9	3.1	3.0	2.95	2.86	2.85	2.82	8.6	8.8	8.6	8.5
Czechoslovakia	0.2	0.2	0.2	4.05	4.26	3.82	3.82	0.7	0.7	0.7	0.7
EC-12	1.6	1.6	1.2	3.32	3.40	3.83	3.66	5.2	5.4	4.7	4.5
Denmark	0.1	0.1	0.1	4.82	4.95	4.84	4.84	0.5	0.5	0.5	0.5
Germany	1.0	1.0	0.7	3.86	3.87	4.93	4.64	3.9	4.0	3.5	3.3
Others	0.6	0.6	0.5	2.29	2.38	2.17	2.20	1.3	1.5	1.0	1.0

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.
2/ Japan, Republic of Korea, and Taiwan.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 5

Rice Area, Yield, and Production
World and Selected Countries and Regions

	AREA			YIELD				PRODUCTION (Rough Basis)				MILLING RATE				PRODUCTION (Milled Basis)			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.			Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Aug.	Sept	1989/90	1990/91	Aug.	Sept	1989/90	1990/91	Aug.	Sept	1989/90	1990/91	Aug.	Sept
	—Million Hectares—			—Metric Tons Per Hectare—				—Million Metric Tons—				—In Percent—				—Million Metric Tons—			
World	146.4	146.9	147.0	3.5	3.5	3.5	3.5	508.7	519.8	508.6	510.5	67.7	67.8	67.7	67.7	344.6	352.3	344.2	345.8
United States	1.1	1.1	1.1	6.4	6.2	6.2	6.2	7.0	7.0	7.1	7.1	73.0	73.0	70.0	70.0	5.1	5.1	5.0	5.0
Total Foreign	145.3	145.8	145.9	3.5	3.5	3.4	3.5	501.7	512.8	501.5	503.3	67.7	67.7	67.6	67.5	339.5	347.2	339.3	340.8
Maj. Foreign Exporters	16.8	16.6	16.6	2.3	2.2	2.3	2.3	38.5	35.9	38.2	37.6	64.0	63.8	64.0	64.1	24.6	22.9	24.4	24.1
Burma	4.7	4.8	4.5	2.9	2.9	2.9	2.8	13.5	13.7	13.4	12.6	60.0	60.0	60.0	60.0	8.1	8.2	8.0	7.6
Pakistan	2.1	2.1	2.1	2.3	2.3	2.3	2.3	4.8	4.9	4.8	5.0	66.7	66.7	66.7	66.7	3.2	3.3	3.2	3.3
Thailand	10.0	9.7	10.0	2.0	1.8	2.0	2.0	20.2	17.3	20.0	20.0	66.0	66.0	66.0	66.0	13.3	11.4	13.2	13.2
Major Importers	13.9	13.9	13.6	4.2	4.2	4.2	4.2	58.6	58.4	57.7	57.6	66.1	66.0	66.1	66.1	38.7	38.6	38.1	38.1
EC-12	0.3	0.4	0.4	6.2	6.4	6.0	6.0	2.1	2.4	2.3	2.3	67.0	67.4	67.4	67.4	1.4	1.6	1.5	1.5
Indonesia	10.5	10.5	10.2	4.2	4.3	4.3	4.4	44.7	45.2	44.5	44.4	65.0	65.0	65.0	65.0	29.1	29.4	28.9	28.9
Nigeria	0.6	0.7	0.7	1.4	1.4	1.4	1.4	0.9	0.9	0.9	0.9	60.0	60.0	60.0	60.0	0.5	0.6	0.6	0.6
Republic of Korea	1.3	1.2	1.2	6.4	6.2	6.4	6.4	8.1	7.7	7.8	7.8	72.8	72.6	72.7	72.7	5.9	5.6	5.7	5.7
Other Maj. Import. 1/	1.2	1.1	1.1	2.4	1.9	2.0	2.0	2.8	2.2	2.2	2.2	65.5	65.4	65.7	65.8	1.8	1.4	1.5	1.5
Other Foreign	114.6	115.3	115.7	3.5	3.6	3.5	3.5	404.6	418.5	405.6	408.2	68.3	68.3	68.2	68.3	276.1	285.8	276.7	278.6
Australia	0.1	0.1	0.1	8.0	8.8	7.9	8.3	0.9	0.8	0.9	1.1	71.5	71.5	71.5	71.5	0.7	0.6	0.6	0.8
Bangladesh	10.5	10.4	10.5	2.6	2.6	2.6	2.6	26.8	26.9	27.6	27.6	66.7	66.7	66.7	66.7	17.9	17.9	18.4	18.4
Brazil	4.3	4.5	5.3	1.7	2.1	1.9	1.9	7.2	9.3	10.0	10.0	68.0	68.0	68.0	68.0	4.9	6.3	6.8	6.8
China	32.7	33.1	32.6	5.5	5.7	5.5	5.6	180.1	189.3	180.0	182.0	70.0	70.0	70.0	70.0	126.1	132.5	126.0	127.4
India	42.2	42.2	42.0	2.6	2.7	2.6	2.6	111.1	112.5	109.5	109.5	66.7	66.7	66.7	66.7	74.1	75.0	73.0	73.0
Japan	2.1	2.1	2.1	6.2	6.3	6.2	6.2	12.9	13.1	12.9	12.9	72.8	72.8	72.8	72.8	9.4	9.6	9.4	9.4
Philippines	3.4	3.5	3.6	2.6	2.7	2.6	2.6	8.9	9.4	9.5	9.5	65.0	65.0	65.0	65.0	5.8	6.1	6.2	6.2
USSR	0.7	0.6	0.7	3.9	4.0	4.0	4.0	2.6	2.4	2.6	2.6	65.0	65.0	65.0	65.0	1.7	1.6	1.7	1.7
Vietnam	5.7	5.7	5.9	3.3	3.3	3.0	3.0	19.0	19.0	17.5	18.0	66.0	66.0	65.0	66.0	12.5	12.5	11.4	11.9
Others	12.9	13.2	12.9	2.7	2.7	2.7	2.7	35.0	35.8	35.1	34.9	66.1	66.2	66.1	66.2	23.2	23.7	23.2	23.1

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Aug.	Sept	1989/90	1990/91	Aug.	Sept
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SOYBEANS											
World	58.26	54.01	55.44	1.84	1.91	1.86	1.84	107.27	102.98	104.22	101.99
United States	24.09	22.87	23.73	2.17	2.29	2.14	2.08	52.35	52.30	50.86	49.45
Total Foreign	34.16	31.15	31.72	1.61	1.63	1.66	1.66	54.92	50.68	53.36	52.54
Maj. Foreign Exporters	16.35	14.40	15.00	1.90	1.83	1.88	1.88	31.09	26.30	28.25	28.25
Argentina	4.95	4.75	5.00	2.17	2.27	2.15	2.15	10.75	10.80	10.75	10.75
Brazil	11.40	9.65	10.00	1.78	1.61	1.75	1.75	20.34	15.50	17.50	17.50
Other Foreign	17.81	16.75	16.72	1.34	1.46	1.46	1.45	23.83	24.38	25.11	24.29
Canada	0.54	0.49	0.58	2.26	2.64	2.33	2.14	1.22	1.29	1.35	1.23
China	8.06	7.56	7.50	1.27	1.46	1.45	1.44	10.23	11.00	11.50	10.80
Eastern Europe	0.70	0.36	0.28	0.97	1.07	1.30	1.30	0.68	0.39	0.36	0.36
EC-12	0.63	0.69	0.58	3.13	3.12	3.14	3.14	1.98	2.17	1.81	1.81
India	2.13	2.30	2.40	0.80	1.04	1.00	1.00	1.72	2.40	2.40	2.40
Indonesia	1.21	1.24	1.26	1.09	1.09	1.11	1.11	1.32	1.35	1.40	1.40
Paraguay	0.98	0.89	0.90	1.61	1.46	1.78	1.78	1.58	1.30	1.60	1.60
USSR	0.83	0.83	0.81	1.15	1.06	1.14	1.14	0.96	0.88	0.92	0.92
Others	2.74	2.39	2.42	1.52	1.51	1.56	1.56	4.17	3.61	3.77	3.78
COTTONSEED											
World	32.05	33.51	34.92	0.96	1.00	1.00	1.00	30.92	33.59	34.87	34.97
United States	3.86	4.75	5.44	1.10	1.14	1.14	1.15	4.24	5.41	6.19	6.26
Total Foreign	28.19	28.77	29.48	0.95	0.98	0.97	0.97	26.68	28.18	28.68	28.71
China	5.20	5.59	6.00	1.24	1.37	1.36	1.36	6.44	7.66	8.16	8.16
India	7.33	7.60	7.80	0.60	0.53	0.54	0.54	4.40	4.00	4.20	4.20
Pakistan	2.60	2.69	2.78	1.12	1.21	1.23	1.23	2.91	3.27	3.40	3.40
USSR	3.33	3.15	3.00	1.53	1.56	1.53	1.53	5.11	4.92	4.60	4.60
Others	9.73	9.74	9.90	0.80	0.85	0.84	0.84	7.82	8.32	8.32	8.35
PEANUTS											
World	19.82	19.47	19.92	1.11	1.14	1.14	1.15	22.06	22.11	22.69	22.86
United States	0.67	0.73	0.79	2.72	2.23	2.91	2.87	1.81	1.63	2.31	2.28
Total Foreign	19.16	18.74	19.13	1.06	1.09	1.07	1.08	20.25	20.48	20.38	20.58
Argentina	0.18	0.20	0.19	1.87	2.37	2.11	2.11	0.34	0.48	0.40	0.40
China	2.96	2.91	3.02	1.81	2.19	1.92	1.99	5.37	6.37	5.80	6.00
India	8.71	8.10	8.30	0.93	0.90	0.92	0.92	8.09	7.30	7.60	7.60
Senegal	0.78	0.92	0.90	1.04	0.73	0.77	0.77	0.82	0.67	0.70	0.70
South Africa	0.09	0.09	0.09	1.28	1.59	1.50	1.50	0.11	0.14	0.14	0.14
Sudan	0.55	0.54	0.53	0.73	0.60	0.75	0.75	0.40	0.33	0.40	0.40
Others	5.89	5.99	6.10	0.87	0.87	0.88	0.88	5.13	5.21	5.35	5.35

TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Aug.	Sept	1989/90	1990/91	Aug.	Sept
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SUNFLOWERSEED											
World	15.88	15.89	15.97	1.38	1.39	1.36	1.33	21.87	22.02	21.43	21.23
United States	0.72	0.75	1.03	1.10	1.38	1.50	1.50	0.80	1.03	1.54	1.54
Total Foreign	15.16	15.14	14.94	1.39	1.39	1.35	1.32	21.07	20.98	19.89	19.69
Argentina	2.80	2.30	2.50	1.36	1.70	1.40	1.40	3.80	3.90	3.50	3.50
China	0.72	0.70	0.71	1.49	1.71	1.62	1.62	1.06	1.20	1.15	1.15
EC-12	2.13	2.55	2.39	1.67	1.61	1.66	1.71	3.54	4.09	3.75	4.10
East Europe	1.27	1.23	1.17	1.81	1.70	1.77	1.77	2.29	2.09	2.08	2.08
USSR	4.46	4.67	4.60	1.59	1.41	1.43	1.30	7.07	6.56	6.60	6.00
Others	3.80	3.70	3.57	0.87	0.85	0.80	0.80	3.32	3.15	2.81	2.87
RAPESEED											
World	17.12	18.12	19.89	1.28	1.42	1.37	1.37	21.85	25.67	27.09	27.22
United States 1/	0.03	0.03	0.06	1.58	1.74	1.75	1.75	0.05	0.05	0.11	0.11
Total Foreign	17.09	18.09	19.83	1.28	1.42	1.36	1.37	21.80	25.62	26.99	27.11
Canada	2.90	2.58	3.27	1.07	1.27	1.31	1.28	3.10	3.28	4.20	4.20
China	4.99	5.50	6.10	1.09	1.26	1.16	1.16	5.44	6.96	7.10	7.10
EC-12	1.81	2.13	2.43	2.96	2.89	2.94	3.00	5.34	6.14	7.07	7.28
East Europe	0.81	0.74	0.69	2.66	2.38	2.48	2.41	2.15	1.75	1.69	1.66
India	4.99	5.60	5.70	0.83	1.02	0.88	0.88	4.12	5.70	5.00	5.00
Others	1.59	1.54	1.65	1.04	1.16	1.12	1.14	1.65	1.78	1.93	1.88
FLAXSEED											
World	3.74	3.79	3.51	0.50	0.62	0.58	0.59	1.85	2.34	2.10	2.09
United States	0.07	0.10	0.12	0.47	0.95	0.97	0.97	0.03	0.10	0.11	0.11
Total Foreign	3.67	3.69	3.39	0.50	0.61	0.57	0.58	1.82	2.24	1.98	1.97
Argentina	0.58	0.58	0.45	0.90	0.83	0.84	0.84	0.52	0.48	0.46	0.38
Canada	0.60	0.73	0.54	0.83	1.29	1.16	1.30	0.50	0.94	0.63	0.70
India	1.18	1.20	1.20	0.29	0.33	0.33	0.33	0.34	0.40	0.40	0.40
USSR	0.97	0.85	0.85	0.24	0.19	0.21	0.21	0.23	0.16	0.18	0.18
Others	0.36	0.34	0.35	0.67	0.77	0.89	0.89	0.24	0.26	0.32	0.31
MAJOR OILSEEDS	146.87	144.80	149.65	1.40	1.44	1.42	1.41	205.83	208.71	212.40	210.36
United States	29.44	29.23	31.17	2.01	2.07	1.96	1.92	59.29	60.53	61.12	59.75
Total Foreign	117.43	115.57	118.48	1.25	1.28	1.27	1.27	146.54	148.18	151.28	150.61
COPRA	--	--	--	--	--	--	--	4.90	4.74	4.81	4.71
PALM KERNEL	--	--	--	--	--	--	--	3.33	3.31	3.59	3.59
TOTAL OILSEEDS	--	--	--	--	--	--	--	*214.07*	*216.76*	*220.80*	*218.66*
PALM OIL 2/	--	--	--	--	--	--	--	10.91	11.04	11.91	11.91

1/ U.S. rapeseed estimates by the WAOB and Interagency Oilseeds Committee. 2/ Not included in total oilseeds.

SEPTEMBER 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 7

Cotton Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Aug.	Sept	1989/90	1990/91	Aug.	Sept
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	31.6	33.3	34.8	552	569	570	573	80.0	87.0	91.1	91.6
United States	3.9	4.7	5.4	688	711	706	715	12.2	15.5	17.6	17.9
Total Foreign	27.7	28.6	29.4	533	545	545	547	67.8	71.5	73.5	73.7
Maj. Foreign Exporters	13.1	13.2	13.6	727	790	775	780	43.7	48.0	48.4	48.7
Australia	0.2	0.3	0.3	1,326	1,563	1,322	1,379	1.4	1.9	1.7	1.9
Central America 1/	0.1	0.1	0.1	832	802	793	793	0.3	0.3	0.3	0.3
China	5.2	5.6	6.0	728	807	798	798	17.4	20.7	22.0	22.0
Egypt	0.4	0.4	0.4	683	719	755	755	1.3	1.4	1.3	1.3
Mexico	0.2	0.2	0.3	891	913	837	837	0.8	0.8	1.0	1.0
Pakistan	2.6	2.7	2.8	560	607	612	612	6.7	7.5	7.8	7.8
Sudan	0.3	0.2	0.2	456	422	498	498	0.6	0.4	0.4	0.4
Turkey	0.7	0.6	0.6	851	1,021	887	956	2.8	3.0	2.5	2.7
USSR	3.3	3.2	3.0	805	827	817	817	12.3	12.0	11.3	11.3
Major Importers 2/	0.4	0.4	0.3	887	801	911	833	1.5	1.5	1.4	1.3
Other Foreign	14.2	14.9	15.4	346	321	334	334	22.6	22.0	23.6	23.6
Argentina	0.6	0.6	0.6	486	444	465	465	1.3	1.3	1.3	1.3
Brazil	1.9	2.0	2.0	347	340	381	381	3.0	3.1	3.5	3.5
India	7.3	7.6	7.8	315	264	279	279	10.6	9.2	10.0	10.0
Syria	0.2	0.2	0.2	930	963	934	934	0.7	0.7	0.7	0.7
Others	4.3	4.6	4.9	358	370	368	368	7.0	7.7	8.2	8.2

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

SEPTEMBER 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 8

The table below presents a 10-year record of the difference between the September projections and the final estimates. Using world wheat production as an example, changes between the September projection and the final estimate have averaged 10.9 million tons (2.2 percent) and ranged from -30.7 to 6.8 million tons. The September projection has been below the final 6 times and above the final 4 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 - 1990/91 1/					
	Difference		Lowest	Highest	Below	Above
	Average	Average	Difference		Final	Final
	Percent	---Million Metric Tons---			Number of Years 2/	
WHEAT						
World	2.2	10.9	-30.7	6.8	6	4
U.S.	0.8	0.5	-1.2	0.8	5	5
Foreign	2.6	11.2	-30.9	7.5	6	4
COARSE GRAINS 3/						
World	1.1	8.5	-22.6	11.3	8	2
U.S.	2.7	5.3	-12.9	6.1	7	3
Foreign	1.4	8.0	-18.9	9.1	5	5
RICE (Milled)						
World	2.7	8.5	-24.1	3.4	9	1
U.S.	4.7	0.2	-0.4	0.3	7	3
Foreign	2.7	8.4	-24.4	3.6	9	1
SOYBEANS						
World	2.6	2.4	-4.4	4.7	4	6
U.S.	4.0	2.0	-2.7	4.6	5	5
Foreign	5.1	2.2	-3.2	4.2	4	6
		---Million 480-lb. Bales---				
COTTON						
World	3.0	2.4	-10.9	4.5	5	5
U.S.	4.5	0.6	-1.9	0.8	5	4
Foreign	3.2	2.2	-11.2	3.7	5	5
UNITED STATES		-------Million Bushels-------				
CORN	5.5	316	-599	1,071	6	4
SORGHUM	6.1	44	-82	83	7	3
BARLEY	3.2	16	-16	46	5	5
OATS	4.7	19	-26	57	4	6

1/ The final estimate for 1981/82-1989/90 is defined as the first November estimate following the marketing year and for 1990/91 last month's estimate.
2/ May not total ten if projection was the same as the final.
3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

September 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

MAP 1

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

SEPTEMBER 12, 1991

NOAA/USDA JOINT AGRICULTURAL WEATHER FACILITY

CANADA

Mostly dry, warm weather in late August favors grain and oilseed harvesting. Recent freezing weather had little impact on maturing crops.

UNITED STATES

Showers across the corn belt reduce moisture stress while warm temperatures promote rapid crop development in western sections. Mostly favorable weather for crops prevails elsewhere. Winter wheat planting is underway with limited moisture in central Plains.

SOUTH AMERICA

In Argentina, periodic rain favors wheat growth. In Brazil, rain is needed for corn planting, and coffee and citrus flowering.

EUROPE

Favorable harvest weather prevails across the north and east. Recent showers and cooler weather in Spain and France ease crop stress. Corn is maturing.

WESTERN USSR

Widespread rain in August benefits immature crops and increases preplanting moisture for 1992 winter grain crops.

SOUTH ASIA

Favorable conditions prevail in central and eastern grain and oilseed areas for reproductive to filling crops. Moisture is limited for late planted grains and oilseeds in the northwest and for establishment of fall planted crops in the southern interior.

NEW LANDS

Above-normal precipitation in August eases drought conditions, benefiting immature crops. The spring grain harvest is off to a slow start because crops are ripening later than usual.

EASTERN ASIA

Tropical storms soak southern China and South Korea. Recent wetness in the North China Plain slows crop harvests.

SOUTHEAST ASIA

Frequent, heavy showers benefit late Thai rice but cause flooding along the Mekong. Rain also helps immature grains over the Philippines but cause some flooding in northwestern rice areas.

AUSTRALIA

Drought prevails in Queensland and northern New South Wales since late July. Wheat is advancing into reproduction in need of moisture.

(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 447-7917.)

WEATHER BRIEFS

SOUTHERN BRAZIL: DRYNESS BECOMING A CONCERN

Rainfall has been below normal and temperatures have been mostly above normal across central and southern Brazil from August 12 - September 11, 1991. Dry conditions have stressed winter wheat in some regions of Rio Grande do Sul and poor soil moisture has caused concern for on-going corn planting in Parana. As of September 12, citrus and coffee are entering their flowering stages and will increase their moisture needs as fruit set. Precipitation has been generally 25 - 50 percent of normal for the months of July and August and substantial rain is needed to improve conditions.

CENTRAL AMERICA: RAINS RETURN

A return to normal-to-above-normal rainfall levels occurred across Guatemala, Honduras and El Salvador during the period of August 27 to September 12. Rainfall had been less than 50 percent of normal across this region for eight weeks prior to August 27. This dry period had adverse effects on summer crops and low reservoir and river levels caused reductions in irrigation and hydroelectric generation. Precipitation was generally above normal this past Spring boosting residual soil moisture somewhat and minimizing the negative impact of the dry period on crops.

SOUTHEAST ASIA: HEAVY RAINS AND DROUGHTS

Normal-to-well-above normal rain not only ended dry conditions across summer crop growing regions of Thailand, Laos, Cambodia, and Vietnam, but caused major flooding along the Mekong River. Rainfall was very heavy during August 17 through September 12, which started with Typhoon Fred dropping as much as 240 millimeters of rain across the region.

Throughout the northern Philippines rainfall was very heavy from August 11 through September 12. Precipitation has been particularly persistent across western Luzon, where rain run-off and thick layers of ash from the Mt. Pinatubo Volcano caused severe damage to villages due to mud flows and landslides. Moderate rainfall, 20-40 millimeters, improved grain planting conditions in northeastern Luzon during the week of September 1 - 7. As of September 12, the central and southern Philippines are becoming too dry.

Rainfall has been seasonably increasing across Malaysia, Sumatra, and Borneo, as of September 12. However, showers have failed to reach the island of Java. A timely start to the rainy season, which should begin around September 15, is crucial to southern Indonesia following this season's failure of secondary rains to develop. Main-season rice planting usually begins in October.

PRODUCTION BRIEFS

SOUTH AFRICA: LAND DIVERSION SCHEME TO END IN OCTOBER

South Africa's land diversion scheme, announced in 1987, will end in October. The scheme to remove about 1 million hectares of marginal land from grain production and put it under pasture is considered by the Government of South Africa as successful since 700,000 to 800,000 hectares of land are expected to be converted by the end of next month. To date, 7,000 farmers have already converted 403,000 hectares, while another 244,000 hectares are in the process of being changed. A late rush to register land is expected as farmers divert their land to collect the $63 per hectare subsidy. Since marginal land is taken out of production, corn will now be produced on better soils and average yields should improve.

INDONESIA: PROLONGED DRYNESS IN JAVA HURTS RICE CROP

Indonesia's second (minor season) rice crop has been damaged by dry weather in Java. Most of the fields affected by the drought are marginal land. Some are not irrigated and some are irrigated but cannot expect adequate water supplies because they are either far from a water source or supplied by small reservoirs currently operating at a fraction of their capacity. The U.S. agriculture attache in Jakarta reported that crops on some marginal land have been abandoned and other fields have been cut for fodder or opened to livestock for grazing. Milled rice production is forecast down 50,000 tons this month to 28.85 million tons. Harvested area is reduced by 100,000 hectares to 10.30 million. The dry weather is seriously depleting Java's irrigation reservoirs; recharging will be needed as farmers prepare their fields for the start of the main season crop beginning in October.

THAILAND: RICE PLANTINGS BENEFIT FROM RECENT RAIN

Heavy rains from tropical storm Fred benefited Thailand's main season rice crop. According to the U.S. agricultural attache in Bangkok, the the upper and central portions of the Northeast Region now have adequate moisture and planting is 70 percent completed. While rains during August also improved the situation in the lower Northeast Region that area remains a little dry. The Northern Region also received beneficial rains in August. There are reports of flooding the Northern Region, but damage is not believed to be significant. Rice plantings are 2-4 weeks behind normal because of earlier dryness. With the recent rains, plantings should be completed by mid-September and normal yields are expected. Infestations of brown planthopper have been seen in a couple of provinces, but no significant problems are reported.

WORLD: SUGAR PRODUCTION REVISED UPWARD

World 1991/92 centrifugal sugar production has been revised upward to 113.2 million tons (raw basis), 640,000 tons more than forecast in May 1991 (see WAP 5-91). This compares with the revised 1990/91 outturn of 112.8 million tons. Major increases for 1991/92 since the May report are: India, 800,000 tons to 13.5 million; Brazil, 600,000 tons to 8.5 million; Turkey 250,000 tons to 2.0 million; and China 200,000 to 7.0 million. Partially offsetting the increases are areas where prospects have declined since the May report: Cuba, 300,000 tons to 7.5 million; and the European Community, 365,000 tons to 16.3 million. The largest percentage change occurred in Sweden, down 28 percent (85,000 tons) since the May report.

EGYPT: PRODUCTION OF PANEL PRODUCTS INCREASING

The wood panel products industry is relatively new to Egypt, according to the U.S. agricultural counselor in Cairo. Currently, one public sector and four private sector plants manufacture plywood, blockboard, and veneer from imported logs. Production for 1991 is forecast at 31,000 cubic meters (CUM), 1,000 CUM greater than a year ago. Plywood is available in thicknesses ranging from 3 to 22 millimeters. Although Egyptian plywood is costly and of relatively poor quality, domestic production is expected to represent 13 percent of total consumption by the end of 1991.

SOUTH AFRICA: FORESTRY SITUATION

According to the U.S. agricultural attache in Pretoria, the South African forestry sector has just completed a decade of spectacular growth despite the moderate downward trend that began in 1990. Production of wood and wood products currently accounts for 2.5 percent of South Africa's gross domestic product, up from 1.2 percent in 1980.

The 1991 timber harvest is forecast at almost 17.8 million cubic meters, slightly below the 1990 cut, due to generally poor economic conditions and reduced demand from domestic and export markets. Since there are few remaining virgin forests in South Africa, commercial plantations supply the bulk of the industry's raw material requirements. Commercial plantation area is estimated at approximately 1.2 million hectares, out of a total land area of 112.3 million hectares. Afforestation ranges from 30,000 to 31,000 hectares per year.

The economic slowdown is expected to lower softwood log production marginally. However, fellings of temperate hardwood logs are trending upward--an indication that the industry's three large private processors are cutting more Eucalyptus grandis and Wattle to expand their pulp and paper operations.

Production of softwood lumber is expected to increase slightly due to brisk demand for structural lumber. A downturn in production of temperate hardwood lumber reflects the fact that South Africa's main hardwood species, Eucalyptus and Wattle, are poorly suited for sawnwood production.

Production estimates are as follows in 1,000 cubic meters:

	1989	1990	1991 1/
HARVEST	18,536	17,979	17,773
Softwood Logs	4,353	4,684	4,675
Temperate Hardwood Logs	535	506	510
Softwood Lumber	1,793	1,734	1,750
Temperate Hardwood Lumber	220	202	200

1/ Preliminary.

COTE D'IVOIRE: FORESTRY SITUATION

The U.S. agricultural attache in Abidjan reports that production of wood and wood products during 1991 is expected to total nearly 3.4 million cubic meters (CUM), 5 percent below the 1990 volume. Log production, currently estimated at 2.4 million CUM, is expected to decline for the second consecutive year due to severe rains that impeded logging operations, a new government auction system for export quotas designed to reduce log exports, and stagnant demand for processed products. Lumber production is forecast at 715,000 CUM, a 5-percent reduction from a year ago. Lumber output is expected to continue trending downward in line with the Government's policy of limiting expansion in the sawmilling industry in order to exploit Cote d'Ivoire's comparative advantage in the production of veneer. The plywood industry has been in decline since 1988--a reflection of dwindling availability of raw material, a shortage of spare parts, and the slow rate of plant renovation. In contrast, the veneer industry has been expanding since 1985. Production in 1991 is forecast at a record 215,000 CUM due to generous log allocations, state-the-of-art equipment, and strong external demand.

Production is estimated as follows in 1,000 cubic meters:

	1987	1988	1989	1990	1991 1/
Tropical Hardwood Logs	2,588	2,543	2,567	2,549	2,400
Tropical Hardwood Lumber	759	784	747	753	715
Tropical Hardwood Veneer	164	179	197	206	215
Tropical Hardwood Plywood	45	53	44	42	39
Total	3,556	3,559	3,555	3,550	3,369

1/ Preliminary.

USSR: LIVESTOCK DEVELOPMENTS IN PERSPECTIVE

Soviet meat production has been in decline since the 1989 record year, but remains above the 1987 level due in part to herd culling.

Soviet cattle inventories reached 122.1 million head on January 1, 1987; however, at the start of 1991, numbers were down to 115.7 million head. Further reductions are expected this year and next. The rate of decline appears to be increasing; in 1989, cattle numbers fell by 1 million head. In 1990 reductions exceeded 2 million head while a decline of more than 3 million head is likely this year. Average carcass weights are also down about 5 percent due to reduced feed supplies and lower slaughter ages.

There has been an even sharper decline in sheep, with numbers falling at 5 million a year since 1990, compared to less than 2 million a year from 1987 to 1990. Projected 1992 inventories are at a 25-year low.

Soviet hog numbers reached 79.5 million head at the start of 1987, fell over 2 million head during the year and then increased during 1988 and 1989. Pork production continued to expand, due to in part to higher carcass weights in 1988 and 1989. Since January 1, 1990, hog numbers have dropped more than 2 million head per year while carcass weights and pork production have declined. The reductions in Soviet inventories have been on state-owned farms while the small private sector has increased.

For the first half of 1991 procurements of all meat, including poultry, from state farms were only 88 percent of the 1990 level. This is apparently due, in part, to increased sales in private markets by both state and private farms. Private markets normally trade at significantly higher prices.

Soviet Livestock and Red Meat Production

	CATTLE	BEEF & VEAL	HOGS	PORK	SHEEP	SHEEP & GOAT MEAT
	1,000 HEAD	1,000MT	1,000 HEAD	1,000MT	1,000 HEAD	1,000MT
1987	122,103	8,288	79,500	6,324	142,210	905
1988	120,592	8,600	77,403	6,600	140,783	1,000
1989	119,580	8,800	78,143	6,700	140,684	1,000
1990	118,400	8,814	78,409	6,646	138,400	1,000
1991 1/	115,700	8.500	75,583	6,250	133,300	950
1992 2/	112,000	8,300	73,000	5,950	128,300	900

Source: U.S. Agricultural Counselor, Moscow, and Official Statistics.
1/ Preliminary. 2/ Forecast.

FEATURE COMMODITY ARTICLES

WORLD RED MEAT PRODUCTION

World 1/ red meat production for 1991 is projected at 119.2 million tons, down slightly from the March forecast, and on par with estimates for 1990. Although 1991 beef, sheep, and goat meat production forecasts have been increased since the March review, the forecast for world pork production has declined over 2 percent. For 1992, red meat production is projected to increase nearly 2 percent over 1991, with pork showing the largest absolute growth.

TABLE 1

World Red Meat Production
(millions tons)

	1989	1990	March 1991	Sept. 1991	Forecast 1992
Beef and Veal	48.4	48.5	47.9	48.2	49.0
Pork	63.4	64.7	66.0	64.6	66.0
Sheep/Goat meat	6.0	6.3	6.3	6.4	6.4
Total	117.8	119.5	120.2	119.2	121.3**

** Totals may not add due to rounding.

World 1991 beef and veal production is projected at 48.2 million tons, slightly less than the record high achieved in 1990. By the end of 1991, world cattle numbers are forecast down marginally, due to the pressure of herd reductions in the Soviet Union. In 1992, beef and veal production is forecast to increase 2 percent.

Herd rebuilding in the United States started in 1989, continued in 1990 with a 1.3-million-head increase and a 3.3-million-head increase is expected this year. U.S. beef production for 1991 is projected up 1 percent, despite cattle slaughter being projected below 1990 levels due to a 10 pound rise in average carcass weight. For 1992, U.S. beef production is forecast to rise another 1 percent due to high carcass weights, plus an increase in slaughter numbers.

In Mexico, improved rainfall this year has permitted some herd growth, compared to the drought-induced herd culling of 6 percent in 1990. Beef production for 1991 is projected down 13 percent. Mexican beef production in 1992 is projected to be slightly above 1991.

Increased slaughter has pushed Argentina's beef production for 1991 up to equal the 1990 output. However, the trend is forecast to reverse in 1992 with lighter carcass weights and lower slaughter reducing production by 2 percent. Argentine cattle numbers have stabilized at 50 million head. Increased taxes and domestic prices that were 30 percent lower in the first half of 1991 stifled most of the potential increase due to recent favorable weather.

1/ Beef, veal, pork, and sheep and goat meat production in selected countries.

EC beef production is projected to be up less than 1 percent this year, but it is forecast to fall slightly in 1992. Cattle numbers were down 1 percent in 1990 and a decline of 2 percent is expected in 1991. Total EC production is being affected by the 33-percent cut in the eastern German states' cattle herd as non-profitable operations are terminated. Surplus beef stocks remain high and current EC cattle prices are between 5 and 10 percent below last year's depressed levels.

In the Soviet Union, feed shortages have caused heavy herd culling in the socialized sector. Despite an increase in cattle slaughter, 1991 beef production is projected down 3 percent because of lower carcass weights. This trend of herd culling and lower beef production is expected to continue next year.

Australian cattle herds are expected to increase 2 percent during 1991 after a slight increase in 1990. Despite decreased competition from sheep and grain production, farmers lack the capital to expand herds to the extent they wish. Beef production is projected down 4 percent in 1991 due to reduced slaughter. Drought-induced culling in 1990 caused slaughter to increase by 9 percent.

World pork production is estimated at 64.6 million tons for 1991, virtually unchanged from 1990. Pork production in 1992 is forecast to increase 1.4 million tons. World hog numbers are expected to increase slightly this year following a similar gain in 1990. U.S. pork production for 1991 is estimated up 4 percent due to increased slaughter and carcass weights. A further 4-percent rise in production is forecast for 1992.

Mexican pork production for 1991 is projected up 3 percent, with an additional slight increase forecast in 1992.

EC pork production is projected to fall 4 percent in 1991 and remain at that level in 1992. This decline is concentrated in the eastern states of Germany, where a drastic reduction in hog numbers of almost 50 percent is occurring as part of the restructuring of the unprofitable and environmentally damaging socialist agricultural sector.

In Hungary, pork production is expected to continue to decline because of a weak domestic market, the collapse of the Soviet market, and reduced export subsidies. In Czechoslovakia, all meat production has declined due economic disruption in the conversion to a less regulated economic system. However, price changes now favor pork, which declined only 5 percent, over beef, which fell almost 14 percent. Depressed grain and potatoes prices have stimulated a 13-percent rise in pork production in Poland this year, but falling pork prices are expected to slow output growth next year.

Soviet hog numbers fell 4 percent during 1990 and a similar rate of decline is expected this year due to feed shortages. Virtually all losses occurred in the socalized sector. The reinvigorated private sector is growing, but at one-fifth of total production, does not counter the overall downward trend. Pork production is forecast down 6 percent this year and 5 percent next year.

Chinese pork production is projected up 2 percent for 1991, compared to a nearly 5 percent increase in 1990. Floods this year damaged the feed supply system, destroyed feed stocks and storage buildings, and drowned some hogs. Pork production in 1992 is forecast to increase 5 percent.

High levels of pork production are expected to continue in Taiwan for both 1991 and 1992, supported by strong demand from Japan.

World sheep and goat meat production in 1991 is estimated at 6.4 million tons, up 2 percent from last year. Production is forecast to fall slightly in 1992. World sheep numbers (excluding China) are expected to fall 4 percent during the current year, following a 2-percent drop in 1990. Most of the 1991 growth in meat production is due to higher slaughter in China and Australia.

Australian production is estimated up 8 percent because of continued heavy sheep slaughter in response to falling wool prices. As a result, Australian inventory numbers are expected to drop 11 percent during 1991. Sheep meat production in 1992 is expected to be down only slightly as low wool prices are expected to discourage sheep herd growth.

In China, sheep meat production is projected up 8 percent in 1991, with a further increase of 4 percent forecast for 1992. The expansion in both sheep meat and beef production in China is believed to be due to better management by livestock-producing households.

Sharp declines are reported in Soviet sheep numbers with sheep and goat meat production falling 5 percent this year and next, to a 25-year low.

New Zealand's sheep numbers were down 4 percent on June 30, 1991 (the start of the marketing year) and are forecast to fall slightly next year. Weak wool and lamb prices are major reasons for the reduction in inventories. Sheep meat production for 1991 is projected down slightly from last year and is expected to continue at that level into 1992.

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TABLE 10

RED MEAT PRODUCTION, SELECTED COUNTRIES 1/
(1,000 METRIC TONS CARCASS-WEIGHT-EQUIVALENT)

	1989	1990	1991	Forecast 1992
Canada	2,164	2,058	2,024	2,120
Mexico	3,125	2,658	2,448	2,460
United States	17,963	17,594	17,997	18,399
NORTH AMERICA	23,252	22,310	22,469	22,979
Costa Rica	81	85	91	90
Dominican Republic	74	64	66	69
El Salvador	27	27	28	30
Guatemala	75	73	67	66
Honduras	24	23	22	22
CENTRAL AMERICA & CARIB.	281	272	274	277
Argentina	2,696	2,738	2,725	2,667
Brazil	4,750	4,450	4,700	5,400
Colombia	881	936	960	971
Peru	112	116	104	100
Uruguay	376	349	280	285
Venezuela	469	481	471	467
SOUTH AMERICA	9,284	9,070	9,240	9,890
Belgium/Luxembourg	1,150	1,100	1,211	1,185
Denmark	1,372	1,411	1,472	1,479
France	3,670	3,816	3,880	3,940
Germany	6,006	6,111	5,380	5,198
Greece	363	359	357	355
Ireland	639	728	792	829
Italy	2,515	2,583	2,582	2,584
Netherlands	2,134	2,198	2,178	2,208
Portugal	364	383	383	382
Spain	2,404	2,537	2,530	2,530
United Kingdom	2,326	2,336	2,364	2,404
EUROPEAN COMMUNITY	22,943	23,562	23,129	23,094

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

SEPTEMBER 1991

TABLE 10 (Continued)

RED MEAT PRODUCTION, SELECTED COUNTRIES 1/
(1,000 METRIC TONS CARCASS-WEIGHT-EQUIVALENT)

	1989	1990	1991	Forecast 1992
Austria	617	629	635	627
Finland	280	303	302	290
Sweden	447	438	424	415
Switzerland	437	434	430	435
OTHER WEST EUROPE	1,781	1,804	1,791	1,767
Bulgaria	638	636	596	616
Czechoslovakia	1,458	1,406	1,295	1,294
Hungary	1,191	1,093	1,004	825
Poland	2,621	2,736	2,868	2,892
Romania	882	902	906	881
Yugoslavia	1,169	1,218	1,150	1,160
EAST EUROPE	7,959	7,991	7,819	7,668
U.S.S.R.	16,500	16,460	15,700	15,150
Israel	39	40	38	37
Saudi Arabia	25	28	30	40
Turkey	645	680	695	710
MIDDLE EAST	709	748	763	787
Egypt	464	489	502	508
South Africa	784	899	914	927
AFRICA	1,248	1,388	1,416	1,435
China	23,262	25,135	25,880	27,410
Hong Kong	30	20	20	19
India	2,407	2,438	2,380	2,468
Korea, South	610	572	601	626
Japan	2,142	2,104	2,060	2,080
Philippines	747	797	819	841
Singapore	75	76	77	79
Taiwan	923	1,014	1,025	1,025
ASIA	30,196	32,156	32,862	34,548
Australia	2,452	2,683	2,663	2,657
New Zealand	1,168	1,022	1,070	1,065
OCEANIA	3,620	3,705	3,733	3,722
TOTAL	117,773	119,466	119,196	121,317

1/ Includes Beef, Veal, Pork and Goat meat.

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

SEPTEMBER 1991

TABLE 11

BEEF AND VEAL PRODUCTION, SELECTED COUNTRIES
(1,000 METRIC TONS CARCASS-WEIGHT-EQUIVALENT)

	1989	1990	1991	Forecast 1992
Canada	980	924	890	915
Mexico	2,140	1,790	1,550	1,555
United States	10,633	10,464	10,566	10,689
NORTH AMERICA	13,753	13,178	13,006	13,159
Costa Rica	81	85	91	90
Dominican Republic	60	51	52	54
El Salvador	27	27	28	30
Guatemala	61	59	53	52
Honduras	24	23	22	22
CENTRAL AMERICA & CARIB.	253	245	246	248
Argentina	2,600	2,650	2,640	2,580
Brazil	3,800	3,400	3,600	4,250
Colombia	741	795	823	839
Peru	112	116	104	100
Uruguay	376	349	280	285
Venezuela	337	382	370	362
SOUTH AMERICA	7,966	7,692	7,817	8,416
Belgium/Luxembourg	312	323	329	332
Denmark	205	202	210	207
France	1,670	1,753	1,800	1,850
Germany	1,963	2,112	2,080	1,950
Greece	82	82	80	76
Ireland	432	486	535	564
Italy	1,140	1,165	1,165	1,165
Netherlands	485	521	530	540
Portugal	120	112	111	110
Spain	451	513	502	480
United Kingdom	980	1,003	1,004	1,034
EUROPEAN COMMUNITY	7,840	8,272	8,346	8,308

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS,USDA

SEPTEMBER 1991

TABLE 11 (Continued)

BEEF AND VEAL PRODUCTION, SELECTED COUNTRIES
(1,000 METRIC TONS CARCASS-WEIGHT-EQUIVALENT)

	1989	1990	1991	Forecast 1992
Austria	213	223	230	222
Finland	107	117	118	108
Sweden	139	145	149	146
Switzerland	157	164	165	167
OTHER WEST EUROPE	616	649	662	643
Bulgaria	136	137	126	126
Czechoslovakia	488	454	391	390
Hungary	108	110	111	100
Poland	729	838	714	690
Romania	210	212	230	230
Yugoslavia	309	352	300	303
EAST EUROPE	1,980	2,103	1,872	1,839
U.S.S.R.	8,800	8,814	8,500	8,300
Israel	39	40	38	37
Saudi Arabia	25	28	30	40
Turkey	270	310	330	350
MIDDLE EAST	334	378	398	427
Egypt	386	408	420	425
South Africa	582	661	678	691
AFRICA	968	1,069	1,098	1,116
China	1,072	1,256	1,430	1,610
India	1,847	1,868	1,801	1,883
Korea, South	124	131	130	135
Japan	548	549	570	575
Philippines	132	132	129	131
Taiwan	6	5	5	5
ASIA	3,729	3,941	4,065	4,339
Australia	1,565	1,718	1,640	1,645
New Zealand	550	470	526	521
OCEANIA	2,115	2,188	2,166	2,166
TOTAL	48,354	48,529	48,176	48,961

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

SEPTEMBER 1991

TABLE 12

PORK PRODUCTION, SELECTED COUNTRIES
(1,000 METRIC TONS CARCASS-WEIGHT-EQUIVALENT)

	1989	1990	1991	FORECAST 1992
Canada	1,184	1,134	1,134	1,205
Mexico	910	792	820	825
United States	7,173	6,965	7,267	7,543
NORTH AMERICA	9,267	8,891	9,221	9,573
Brazil	950	1,050	1,100	1,150
Colombia	140	141	137	132
Dominican Rep.	14	13	14	15
Guatemala	14	14	14	14
Venezuela	132	99	101	105
CENTRAL AND SOUTH AMERICA	1,250	1,317	1,366	1,416
Belgium/Luxembourg	831	770	876	847
Denmark	1,165	1,207	1,260	1,270
France	1,840	1,870	1,890	1,900
Germany	4,001	3,949	3,250	3,200
Greece	151	147	151	152
Ireland	144	157	162	168
Italy	1,295	1,333	1,330	1,330
Netherlands	1,636	1,661	1,630	1,650
Portugal	216	243	244	244
Spain	1,722	1,788	1,780	1,800
United Kingdom	978	962	982	996
EUROPEAN COMMUNITY	13,979	14,087	13,555	13,557
Austria	404	406	405	405
Finland	173	186	184	182
Sweden	308	293	275	269
Switzerland	280	270	265	268
OTHER WEST EUROPE	1,165	1,155	1,129	1,124
Bulgaria	424	422	400	420
Czechoslovakia	960	942	894	894
Hungary	1,079	970	893	725
Poland	1,870	1,870	2,122	2,185
Romania	600	620	600	575
Yugoslavia	791	799	785	790
EAST EUROPE	5,724	5,623	5,694	5,589
U.S.S.R.	6,700	6,646	6,250	5,950
China	21,228	22,811	23,300	24,600
Hong Kong	30	20	20	19
Korea, South	485	440	470	490
Japan	1,594	1,555	1,490	1,505
Philippines	615	665	690	710
Singapore	75	76	77	79
Taiwan	917	1,009	1,020	1,020
ASIA	24,944	26,576	27,067	28,423
Australia	302	319	325	335
New Zealand	44	43	42	41
OCEANIA	346	362	367	376
TOTAL	63,375	64,657	64,649	66,008

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

SEPTEMBER 1991

TABLE 13

LAMB, MUTTON, GOAT MEAT PRODUCTION, SELECTED COUNTRIES
(1,000 METRIC TONS CARCASS-WEIGHT-EQUIVALENT)

	1989	1990	1991	FORECAST 1992
Mexico	75	76	78	80
United States	157	165	164	167
NORTH AMERICA	232	241	242	247
ARGENTINA	96	88	85	87
Belgium/Luxembourg	7	7	6	6
Denmark	2	2	2	2
France	160	193	190	190
Germany	42	50	50	48
Greece	130	130	126	127
Ireland	63	85	95	97
Italy	80	85	87	89
Netherlands	13	16	18	18
Portugal	28	28	28	28
Spain	231	236	248	250
United Kingdom	368	371	378	374
EUROPEAN COMMUNITY	1,124	1,203	1,228	1,229
Bulgaria	78	77	70	70
Czechoslovakia	10	10	10	10
Hungary	4	4	4	4
Poland	22	28	32	17
Romania	72	70	76	76
Yugoslavia	69	67	65	67
EAST EUROPE	255	256	257	244
U.S.S.R.	1,000	1,000	950	900
Egypt	78	81	82	83
South Africa	202	238	236	236
AFRICA	280	319	318	319
China	962	1,068	1,150	1,200
India	560	570	579	585
Korea, South	1	1	1	1
Turkey	375	370	365	360
MIDDLE EAST & ASIA	1,898	2,009	2,095	2,146
Australia	585	646	698	677
New Zealand	574	509	502	503
OCEANIA	1,159	1,155	1,200	1,180
TOTAL	6,044	6,271	6,375	6,352

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

SEPTEMBER 1991

TABLE 14

CATTLE AND BUFFALO INVENTORIES, SELECTED COUNTRIES
(1,000 HEAD JANUARY 1)

	1989	1990	1991	Forecast 1992
Canada	11,016	11,147	11,198	11,400
Mexico	34,999	31,747	29,847	29,887
United States	98,065	98,162	99,436	102,690
NORTH AMERICA	144,080	141,056	140,481	143,977
Costa Rica	1,735	1,762	1,762	1,741
Dominican Republic	1,990	1,986	1,977	1,976
El Salvador	1,162	1,220	1,242	1,285
Guatemala	2,100	1,900	1,695	1,532
Honduras	2,457	2,424	2,388	2,356
CENTRAL AMERICA & CARIB.	9,444	9,292	9,064	8,890
Argentina	50,782	50,582	50,080	50,079
Brazil	130,500	130,850	131,275	130,700
Colombia	17,627	16,835	16,225	16,145
Peru	4,000	3,800	3,630	3,510
Uruguay	10,548	9,377	9,431	10,058
Venezuela	13,095	13,210	13,368	13,648
SOUTH AMERICA	226,552	224,654	224,009	224,140
Belgium/Luxembourg	3,174	3,259	3,378	3,382
Denmark	2,226	2,232	2,241	2,200
France	20,120	19,980	19,886	19,926
Germany	20,369	20,287	19,488	18,108
Greece	723	687	634	616
Ireland	5,637	5,899	6,029	6,180
Italy	8,843	8,853	8,578	8,222
Netherlands	4,606	4,731	4,830	5,000
Portugal	1,359	1,330	1,332	1,336
Spain	5,200	5,331	5,126	5,000
United Kingdom	11,902	11,922	11,845	11,821
EUROPEAN COMMUNITY	84,159	84,511	83,367	81,791

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

SEPTEMBER 1991

TABLE 14 (Continued)

CATTLE AND BUFFALO INVENTORIES, SELECTED COUNTRIES
(1,000 HEAD JANUARY 1)

	1989	1990	1991	Forecast 1992
Austria	2,541	2,562	2,584	2,513
Finland	1,379	1,363	1,315	1,292
Sweden	1,676	1,697	1,660	1,612
Switzerland	1,850	1,855	1,829	1,827
OTHER WEST EUROPE	7,446	7,477	7,388	7,244
Bulgaria	1,615	1,577	1,524	1,512
Czechoslovakia	5,075	5,129	4,923	4,838
Hungary	1,690	1,598	1,571	1,500
Poland	10,322	10,143	9,024	8,600
Romania	6,416	6,283	5,952	5,754
Yugoslavia	4,759	4,705	4,527	4,600
EAST EUROPE	29,877	29,435	27,521	26,804
U.S.S.R.	119,580	118,400	115,700	112,000
Israel	191	190	186	184
Saudi Arabia	217	191	176	158
Turkey	13,400	12,700	12,200	11,700
MIDDLE EAST	13,808	13,081	12,562	12,042
Egypt	6,331	6,385	6,408	6,418
South Africa	12,675	13,398	13,512	13,585
AFRICA	19,006	19,783	19,920	20,003
China	97,950	100,752	105,000	108,500
India	267,620	270,150	272,710	271,437
Korea, South	2,039	2,051	2,125	2,220
Japan	4,682	4,760	4,863	4,878
Philippines	4,524	4,395	4,387	4,375
Taiwan	176	165	154	158
ASIA	376,991	382,273	389,239	391,568
Australia	23,938	24,233	24,300	24,800
New Zealand	8,058	7,828	8,065	8,235
OCEANIA	31,996	32,061	32,365	33,035
TOTAL	1,062,939	1,062,023	1,061,616	1,061,494

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

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TABLE 15

HOG INVENTORIES, SELECTED COUNTRIES
(1,000 HEAD JANUARY 1)

	1989	1990	1991	FORECAST 1992
Canada	11,018	10,737	10,608	10,780
Mexico	9,003	8,563	8,593	9,193
United States	55,469	53,852	54,462	58,000
NORTH AMERICA	75,490	73,152	73,663	77,973
Brazil	31,700	33,200	32,500	33,100
Colombia	2,393	2,434	2,398	2,369
Dominican Rep.	293	306	306	305
Guatemala	1,110	1,100	1,110	1,115
Venezuela	2,961	2,326	1,971	1,802
CENTRAL AND SOUTH AMERICA	38,457	39,366	38,285	38,691
Belgium/Luxembourg	6,306	6,510	6,341	6,421
Denmark	9,105	9,120	9,282	9,500
France	11,866	11,860	11,860	11,560
Germany	35,235	34,178	30,818	28,868
Greece	1,114	1,100	1,141	1,150
Ireland	961	999	1,069	1,099
Italy	9,360	9,261	9,119	9,050
Netherlands	13,820	13,638	13,788	13,600
Portugal	2,326	2,531	2,663	2,834
Spain	16,100	16,910	16,001	16,200
United Kingdom	7,626	7,383	7,379	7,423
EUROPEAN COMMUNITY	113,819	113,490	109,461	107,705
Austria	3,874	3,773	3,688	3,600
Finland	1,327	1,348	1,290	1,231
Sweden	2,264	2,264	2,170	2,143
Switzerland	1,869	1,787	1,723	1,678
OTHER WEST EUROPE	9,334	9,172	8,871	8,652
Bulgaria	4,132	4,352	4,340	4,390
Czechoslovakia	7,348	7,498	7,090	6,800
Hungary	8,327	7,660	8,000	7,400
Poland	19,605	18,685	19,739	21,500
Romania	14,350	11,659	13,929	15,000
Yugoslavia	7,396	7,231	7,358	7,360
EAST EUROPE	61,158	57,085	60,456	62,450
U.S.S.R.	78,143	78,409	75,583	73,000
China	342,220	352,810	362,410	365,000
Korea, South	4,852	4,801	4,528	4,558
Japan	11,866	11,816	11,335	11,500
Philippines	7,909	8,124	8,007	8,150
Taiwan	6,954	7,783	8,565	8,500
ASIA	373,801	385,334	394,845	397,708
Australia	2,766	2,765	1,881	1,076
New Zealand	414	380	395	405
OCEANIA	3,180	3,145	2,276	1,481
TOTAL	753,382	759,153	763,440	767,660

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

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TABLE 16

SHEEP INVENTORIES, SELECTED COUNTRIES
(1,000 HEAD JANUARY 1)

	1989	1990	1991	FORECAST 1992
United States	10,858	11,363	11,200	10,900
Argentina	29,345	28,571	27,552	26,506
Belgium/Luxembourg	156	158	163	163
Denmark	86	100	111	125
France	11,500	11,500	11,500	11,595
Germany	4,098	4,136	3,239	2,879
Greece	10,694	10,150	9,759	9,694
Ireland	4,991	5,782	6,001	6,236
Italy	11,623	11,695	11,575	11,594
Netherlands	1,405	1,702	1,800	1,810
Portugal	3,187	3,347	3,413	3,543
Spain	23,797	25,447	24,037	25,000
United Kingdom	29,045	29,521	29,776	29,925
EUROPEAN COMMUNITY	100,582	103,538	101,374	102,564
Bulgaria	8,593	7,988	7,309	7,241
Czechoslovakia	1,047	1,051	1,087	1,087
Hungary	2,216	2,069	1,865	1,723
Poland	4,300	4,196	3,798	3,200
Romania	16,210	15,442	15,038	14,830
Yugoslavia	7,564	7,596	7,431	7,500
EAST EUROPE	39,930	38,342	36,528	35,581
U.S.S.R.	140,684	138,400	133,300	128,300
Egypt	3,451	3,534	3,554	3,439
South Africa	30,935	32,665	32,580	32,500
AFRICA	34,386	36,199	36,134	35,939
India	46,216	47,277	48,248	48,178
Turkey	45,700	45,300	45,000	44,600
MIDDLE EAST & ASIA	91,916	92,577	93,248	92,778
Australia	171,292	177,841	175,570	157,900
New Zealand	64,600	60,569	57,853	57,786
OCEANIA	235,892	238,410	233,423	215,686
TOTAL	683,593	687,400	672,759	648,254
China *	201,530	211,600	211,642	205,700
TOTAL	885,123	899,000	884,401	853,954

* Includes Goats In China.

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

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WORLD ALMOND PRODUCTION

World commercial almond production during the 1991/92 season is forecast at 316,900 tons (shelled basis), 23 percent below last year's record of 412,900 tons. Crops in the United States, Greece, and Italy are expected to be substantially smaller than a year ago primarily due to adverse weather conditions during the growing season. Preliminary assessments indicate production will return to a more normal level in both Portugal and Spain. Record crops are forecast for Morocco and Turkey.

Almond production in the United States is forecast at 208,700 tons, 30 percent below the 1990/91 volume, and potentially the smallest U.S. crop since 1986. The decline reflects a combination of factors. Bearing acreage during the 1991/92 season is expected to drop to 409,000 acres, 2,000 acres less than last year. March rains eased the drought situation but resulted in widespread flower loss, particularly among the late blooming varieties. Cool weather in April caused a higher-than-normal nut drop and delayed maturity by 7-10 days. However, the cooler temperatures also dampened the impact of the water shortage and prevented serious disease and insect problems.

Almond production in Greece is expected to decline for the third consecutive year. The 1991/92 harvest is currently estimated at 11,000 tons, down 29 percent from a year ago due to inclement weather, declining area, and low producer prices. The most significant factor contributing to the decline was excessive rainfall during the blossoming stage that sharply reduced output in the two, main growing areas, Thessaly and Macedonia. Very low producer prices, coupled with parallel increases in production costs, further dampened growers' interest in almond cultivation this season. During the past few years, planted area has declined at an annual rate of 2 to 5 percent. New plantings have been minimal except for limited replacement of old trees with the new, more productive Feragnes variety. Given the current downward trend in the industry, the Government's target of an annual production volume of approximately 13-14,000 tons appears unrealistic.

Italy's 1991/92 almond crop is projected at 11,000 tons, 42 percent less than a year ago and potentially the third smallest harvest in the last 5 decades. Heavy spring rains and below normal temperatures inhibited pollination, adversely affected crop maturation, and delayed harvesting 2 to 3 weeks. However, kernel sizes are reportedly above average and of generally good quality. The long-term outlook for the Italian almond industry is bleak. Production has declined significantly during the last 25 years and uprootings continue unabated. Growers in Apulia and Sicily, the two largest growing areas, are gradually limiting almond production to only the most marginal, hilly, non-irrigated land. The more productive areas are now being planted to vegetables, table grapes, and citrus.

Spain's annual production of almonds is primarily determined by weather factors. A combination of rain, fog, and frosts during pollination and blooming resulted in a moderately poor set this season. However, preliminary assessments indicate the 1991/92 crop will total a respectable 55,000 tons, 10 percent larger than the 1990/91 harvest, but significantly below Spains's production potential of 80,000 tons. Quality and kernel size are reportedly good. Spain's almond area appears to have stabilized at 648,000 hectares, of which approximately 600,000 hectares are bearing and 60-70,000 are irrigated.

Orchards uprooted in marginal producing areas in the Levant have been balanced by new production areas in Murcia, Andalusia, and Aragon where farmers are experimenting with high-yield, frost-resistent varieties, modern farming techniques, and minimal irrigation use. Cultural practices, pest and disease control measures, and storage facilities have also improved in recent years despite rising production costs, labor shortages, and, until this season, low producer prices.

Almond production in Portugal is expected to rebound to 3,000 tons during the 1991/92 season, a 20-percent increase over last year. Crop quality is reportedly good, but below average rainfall stunted kernel sizes. Planted area appears stable at 42,000 hectares due, in large part, to a gradual orchard relocation process. Orchards in the traditional production centers in Tras-os-Montes and the southern Algarve are increasingly being replanted with citrus or olives, or zoned for construction. At the same time, new production areas are being opened and, thus far, have proven to be viable sites for modern industrial-scale plantations. Until recently, the almond industry was regarded as a sector in decline due to its numerous production problems. However, the long-term viability of the industry is expected to improve given the emergence of structured production zones, a shift to late flowering, high-yielding, disease resistant varieties, and new incentives and support measures activated by Portugal's acceptance of the 10-year, 2-stage EC-Accession regime.

Almond production in Turkey and Morocco has been trending upward for the past four years. Turkey is expected to harvest a record crop of 16,000 tons, up 7 percent from 1990/91 due to generally favorable growing conditions and a small increase in the number of bearing trees.

Current projections indicate Morocco's 1991/92 almond crop will total a record 12,200 tons, up 6 percent from a year ago due to optimum growing conditions, an increase in harvested area, and improved cultivation methods. The Ministry of Agriculture currently administers several programs designed to improve and expand almond area and production. The mainstay of these programs is the technical assistance and extension services provided to growers free of charge. A planting program, under the auspices of the Ministry of Agriculture and the Ministry of Interior, has boosted the total number of trees to an all-time high of 17.6 million, of which a record 13.4 million are bearing. The beneficial impact of these programs is evidenced not only by the steady growth in planted area, bearing tree numbers, and production, but by the growing number of intensive farms, the adoption of new, improved varieties, higher producer prices, and rising domestic demand.

TABLE 17. WORLD ALMOND PRODUCTION
(1,000 Metric Tons - Shelled Basis)

	1987/88	1988/89	1989/90	1990/91	1991/92 1/
Greece	8.5	19.0	17.2	15.5	11.0
Italy	12.0	14.0	18.0	19.0	11.0
Morocco	6.3	7.4	11.1	11.5	12.2
Portugal	2.7	0.9	3.5	2.5	3.0
Spain	65.0	40.0	80.0	50.0	55.0
Turkey	10.0	14.0	15.0	15.0	16.0
United States	299.4	267.6	222.3	299.4	208.7
Total	403.9	362.9	367.1	412.9	316.9

1/ Preliminary.

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WORLD FILBERT PRODUCTION

Preliminary assessments indicate that record 1991/92 harvests in Italy and the United States will more than offset moderate production declines in Turkey and Spain. Combined output is currently forecast at 530,600 tons (inshell basis), 5 percent greater than a year ago.

Filbert production in Italy is forecast at a record 140,000 tons, 75 percent larger than the exceptionally poor outturn in 1990/91. Growing conditions were generally favorable despite heavy spring rains that delayed harvesting operations for 2 to 3 weeks.

The 1991/92 U.S. filbert crop is expected to reach an all-time high of 23,600 tons, up 20 percent from last year, and 6 percent above the previous record of 22,300 tons set during the 1985/86 season. The spring of 1991 was cooler and wetter than normal which delayed maturation of the crop by 7 to 10 days. Crop quality and kernel size were not affected and are reportedly above average.

Turkey, the world's leading commercial filbert producer, is expected to harvest a 1991/92 crop of 350,000 tons, a 10 percent reduction from last year, and significantly below the record 1989/90 output. With only marginal increases in planted area and bearing tree numbers, Turkey's annual crop is determined mainly by seasonal growing conditions. The 1991/92 season was unusually wet, particularly during the blossoming stage. Pollination was inhibited, resulting in a poor fruit set throughout the central Black Sea region. Better-than-average yields in the western growing areas partially compensated for the decline.

For the second consecutive year, drought plagued Spain's major filbert growing areas. As a result, the 1991/92 filbert crop is expected to decline 6 percent to a 7-year low of 17,000 tons. Crop quality reportedly ranges from fair to slightly below average. Rising production costs and low producer prices are discouraging many Spanish producers from using appropriate cultivation techniques and many orchards are showing signs of deterioration. Yields are already declining because of the persistent drought and poor orchard maintenance will probably result in further reductions. This would be unfortunate since, until recently, Spain's yields compared favorably to those in competing countries.

TABLE 18. FILBERT PRODUCTION
(1,000 Metric Tons - Inshell Basis)

	1987/88	1988/89	1989/90	1990/91	1991/92 1/
Italy	90.0	140.0	140.0	80.0	140.0
Spain	32.0	17.5	25.0	18.0	17.0
Turkey	280.0	410.0	500.0	390.0	350.0
United States	19.8	15.0	11.8	19.7	23.6
Total	421.8	582.5	676.8	507.7	530.6

1/ Preliminary.

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CHINA: Roundwood production has been trending downward since 1988 due to declining domestic demand, the gradual depletion of large diameter logs, and the Government's continuing restrictions on the use of wood for construction. The 1991 harvest is forecast at 105.5 million cubic meters (CUM), down 4 percent from a year ago, and 18 percent below the record 1988 cut of 128.0 million CUM. China's eighth 5-year plan (1991-1995) calls for the expansion, protection, and more efficient utilization of domestic forestry resources. Expansion plans by the Ministry of Forestry (MOF) envision 4 to 5 million hectares of plantings per year. Assuming an 80-percent survival rate, the MOF projects that forested area will increase from 13 percent of China's total land area, or 124.7 million hectares, to 16 percent of total land area by the year 2000. To date, the bulk of these plantings have been fast-growing species that will quickly rebuild the forest base and provide a rapid return on investment. Protection measures include stricter efforts to enforce the annual cutting quota, and greater emphasis on large scale afforestation projects that serve as shelterbelts as well as future timber resources. To ensure efficient utilization of its remaining, commercially viable resources, the Government is committed to eliminating all non-essential uses of wood. Current policy requires substitution with products such as steel, iron, or plastic whenever possible.

Constraints caused by Government harvesting limitations, declining stocks of commercially usable logs, and increasing labor costs are expected to reduce China's 1991 output of softwood and temperate hardwood logs and lumber. Total lumber production remains limited by domestic milling capacity, and Government policies favoring the upgrade and expansion of integrated processing facilities for panel products. Plywood production continues to expand, although the emphasis has shifted to upgrading quality rather than expanding production capacity. The production of artificial board products, particularly medium density fiberboard, oriented strand board and particleboard, is one area that represents an ideal opportunity for the industry to improve wood utilization. Chinese board products are manufactured primarily from wood residues rather than wood chipped explicitly for that purpose. The MOF estimates that the equivalent of 13 million CUM of wood have been saved by the introduction of new technologies and state-of-the-art manufacturing lines that use wood waste to produce high quality board products. The MOF target is to increase production of all panel products by 15 percent annually. Output of panel products during 1991 is expected to exceed 2.7 million CUM, slightly above the 1990 volume, but well below the 15 percent target.

TABLE 19. CHINA FORESTRY PRODUCTION
(1,000 Cubic Meters)

	1989	1990	1991 1/
HARVEST	119,080	109,500	105,500
Softwood Logs	73,850	67,890	65,500
Temperate Hardwood Logs	45,230	41,610	40,000
Softwood Lumber	18,290	17,650	17,030
Temperate Hardwood Lumber	9,850	10,819	10,400
Railroad Ties/Sleepers	1,200	1,300	1,400
Softwood Plywood	580	590	600
Temperate Hardwood Plywood	145	145	150
Fiberboard	1,443	1,494	1,500
Particleboard	442	458	460

1/ Preliminary.

INDONESIA: Heightened international concern over depletion of the world's tropical rain forests, coupled with the economic necessity of ensuring a sustainable supply of raw material for its own downstream wood products industries, has prompted the Indonesian Government to implement policies designed to effectively manage and protect its forest resources. Estimates of the rate of deforestation vary, but Indonesia appears to be losing approximately 1.0 million hectares of forest each year through the combined effects of logging, expansion of agricultural areas, and conversion of land for other development projects. The Government's commitment to arrest the depletion of its timber base, and improve forest management techniques, is being accomplished through reforestation programs, implementation of a selective felling system, Government incentives for planting timber estates, closer supervision of concession holders' activities, and stricter enforcement of the U.S.$10.00 per cubic meter reforestation tax.

In an effort to manage log production, the Department of Forestry has set a maximum allowable cut of 32 million CUM per year, well below the industry's annual logging capacity of 48 million CUM. Hardwood log production for 1991 is forecast at 26.5 million CUM, slightly below the 1990 harvest, but 17 percent smaller than the allowable cut, due to the reforestation tax, higher export taxes on sawn timber, a ban on new concession licenses, and stricter enforcement of concession regulations.

Indonesia's milling capacity is approximately 18.4 million CUM. Production of hardwood lumber during 1991 is forecast at 8.4 million CUM, down 7 percent from a year ago, and significantly below the industry's installed capacity. Tighter log supplies and an export tax on sawn timber have been instrumental in changing the composition of log use between sawmill and plywood plants. Now, nearly 70 percent of Indonesia's annual log harvest is consumed by the plywood industry. During 1991, plywood production is expected to total 9.6 million CUM, an impressive volume compared to the 279,000 CUM produced in 1977. Current assessments indicate steady, but slower growth in the plywood industry over the next several years given the harvesting cap and the present moratorium on start-ups of new plywood plants.

Particleboard production is forecast to increase for the second consecutive year to 320,000 CUM. Currently, there are 7 particleboard mills with a combined production capacity of 400,000 CUM per year, competing for waste products from the plywood and sawmill industries. Future output is expected to be tempered by static production of wood chips and slack domestic demand resulting from high commercial interest rates.

TABLE 20. INDONESIA FORESTRY PRODUCTION
(1,000 Cubic Meters)

	1989	1990	1991 1/
Tropical Hardwood Logs	28,000	27,000	26,500
Tropical Hardwood Lumber	10,371	9,000	8,400
Railroad Ties/Sleepers	18	15	15
Tropical Hardwood Plywood	8,784	9,250	9,600
Tropical Hardwood Veneer	31	44	60
Particleboard	300	310	320

1/ Preliminary.

JAPAN: There are approximately 24.6 million hectares of forest land in Japan encompassing a growing stock of nearly 3.0 billion CUM. Total forest area has remained relatively stable over the past 30 years, but there has been a marked increase in area devoted to plantation forests vis-a-vis natural growth forests. Japanese forestry enterprises are small and generally operate under consignment from forest owners, the majority of which cut less than 1,000 CUM per year. For the past decade, Japan's forest owners increasingly have faced financial difficulties due to poor productivity, low stumpage prices, de-population of forest areas, and an aging workforce.

Production of softwood and temperate hardwood logs has been trending downward since 1988 primarily due to a steady rise in labor costs associated with harvesting domestic logs. The decline in temperate hardwood logs has been more pronounced because of raw material shortages, escalating prices for Hokkaido hardwoods, and quality characteristics that make Japan's hardwood species better suited for chip and pulp production rather than more profitable products like lumber or plywood.

Total sawnwood production for 1991 is forecast at 28.6 million CUM, down 4 percent from the 1990 volume of 29.8 million CUM. The reduction in mill output reflects the declining availability of domestic and imported logs, a slowdown in housing starts, and weak demand from the furniture industry.

The panel products industry is the only processing sector expected to record modest gains during 1991. To supplement declining production of temperate and tropical hardwood veneers, manufacturers began increasing output of softwood veneer in 1987. Production of softwood veneer sheets during 1991 is forecast at a record 220,000 CUM, up 14 percent from a year ago. For the past several years, domestic plywood manufacturers have devoted more processing capacity to the production of softwood plywood. Reportedly, the industry target is to increase the production share of softwood plywood to 30 percent of total domestic plywood production over the next five years, with a further increase to 50 percent by the year 2002. More moderate gains are projected for board products. Current assessments indicate expansion will be concentrated in the particleboard and medium density fiberboard sectors.

TABLE 21. JAPAN FORESTRY PRODUCTION
(1,000 Cubic Meters)

	1989	1990	1991 1/
HARVEST	30,515	29,300	30,000
Softwood Logs	17,175	16,775	16,500
Temperate Hardwood Logs	2,446	2,219	2,100
Poles/Piles/Posts/Pitprops	403	368	350
Softwood Lumber	27,067	26,551	25,500
Temperate Hardwood Lumber	1,524	1,365	1,300
Tropical Hardwood Lumber	1,890	1,865	1,800
Softwood Veneer	170	193	220
Temperate Hardwood Veneer	199	178	160
Tropical Hardwood Veneer	7,307	6,924	6,500
Softwood Plywood	195	216	230
Temperate Hardwood Plywood	234	219	210
Tropical Hardwood Plywood	6,277	6,304	5,800
Hardboard	150	145	140
Medium Density Fiberboard	237	264	275
Insulation Board	518	528	525
Particleboard	1,092	1,072	1,080

1/ Preliminary.

REPUBLIC OF KOREA: Despite what is widely recognized as one of the most successful reforestation programs in the world, Korea remains highly dependent on imports to meet its raw material requirements. Total forest land is relatively stable at 6.5 million hectares. Current assessments place the total volume of standing timber at 234.0 million CUM. However, three-quarters of this timber is less than 30 years old. Annual roundwood production capacity is estimated at approximately 1.6 million CUM. The 1991 timber cut is forecast at 1.2 million CUM, up 7 percent from a year ago, but 34 percent below capacity because most trees are red pine and, thus, commercially unsuitable for downstream processing into lumber or plywood. Efforts by the Forestry Administration to increase utilization of domestic timber in value-added processing have been marginal because of poor tree quality, and the fact that less than 5 percent of pine stocks and less than 2 percent of the other major species are over 30 centimeters in diameter. Therefore, the bulk of the annual cut is usable mainly for pitprops and pulpwood. Korea's reforestation program has increased the total growing stock and improved erosion control, but has failed to expand supplies of commercially usable timber.

Strong growth in the Korean economy, coupled with the current domestic construction boom, is expected to boost 1991 output of lumber and panel products manufactured from imported logs. Record production levels are expected for softwood lumber, temperate and tropical hardwood lumber, hardboard and medium density fiberboard. Modest gains are forecast for tropical hardwood plywood and particleboard. Board products are Korea's growth sector for the 1990's. One major particleboard plant intends to expand its facilities by the end of 1992, and two additional plants are scheduled to open by the end of 1993. As a result, total processing capacity is expected to triple within the next two years. By the end of 1991, Korea reportedly will have four, fully operational medium density fiberboard plants with a combined annual production capacity of 339,000 CUM. Hardboard production more than doubled between 1989 and 1990. Output in 1991 is expected to increase 24 percent to 67,000 CUM.

TABLE 22. KOREAN FORESTRY PRODUCTION
(1,000 Cubic Meters)

	1989	1990	1991 1/
HARVEST	1,227	1,138	1,220
Softwood Lumber	2,978	3,481	3,800
Temperate Hardwood Lumber	39	47	55
Tropical Hardwood Lumber	1,219	1,350	1,400
Tropical Hardwood Plywood	1,180	1,199	1,200
Hardboard	25	54	67
Medium Density Fiberboard	85	113	170
Particleboard	164	165	170

1/ Preliminary.

TAIWAN: Timber production continues to decline due to the inaccessibility of remaining timber stands, rising logging costs, local labor shortages, conservation and environmental concerns, and cheaper imports of logs and wood products. Domestic timber supplied less than 3 percent of Taiwan's raw material requirements in 1990, and is expected to contribute even less in 1991. The 1991 timber cut is forecast at 100,000 CUM, down 12 percent from last year, and 73 percent below the Government's maximum allowable cut of 365,000 CUM. Production of hardwood lumber and panel products is expected to continue trending downward in 1991. However, production of softwood lumber is forecast to increase by 11 percent over 1990 due to increased local demand for construction materials and interior wood products.

TABLE 23. TAIWAN FORESTRY PRODUCTION
(1,000 Cubic Meters)

	1989	1990	1991 1/
HARVEST	157	114	100
Softwood Lumber	56	36	40
Temperate Hardwood Lumber	676	574	500
Tropical Hardwood Lumber	227	170	160
Tropical/Temperate Hardwood Veneer	929	865	850
Tropical/Temperate Hardwood Plywood	583	469	400
Particleboard	110	105	90

1/ Preliminary.

MALAYSIA: In recent years, Malaysia has been accused of indiscriminate and excessive logging of its tropical rain forests. In response to this criticism, the Federal Government revised its domestic forest policy to include tighter controls on logging, improvements in forest management, better utilization of rubberwood supplies, and the establishment of additional commercial forest plantations.

Production prospects for the 1991 season appear favorable. Malaysia's tropical timber industry is expected to record gains in all major sectors. The 1991 timber harvest is forecast at 40.0 million CUM, up 3 percent from a year ago, but 2 percent below the record cut in 1989. Tropical hardwood log production is expected to rebound 2 percent, to 39.5 million CUM. Tighter restrictions on log exports, Government efforts to expand downstream processing, and greater demand from domestic and export markets, is expected to boost production of tropical hardwood lumber, plywood and veneer. Current forecasts for lumber and plywood indicate record production levels of 8.8 million CUM and 1.3 million CUM, respectively.

TABLE 24. MALAYSIAN FORESTRY PRODUCTION
(1,000 Cubic Meters)

	1989	1990	1991 1/
HARVEST	40,812	39,066	40,000
Tropical Hardwood Logs	40,392	38,655	39,520
Tropical Hardwood Lumber	8,382	8,560	8,880
Tropical Hardwood Plywood	1,007	1,270	1,300
Tropical Hardwood Veneer	429	500	540
Poles/Piles/Posts/Pitprops	420	445	480
Particleboard	95	110	120

1/ Preliminary.

THE PHILIPPINES: Productivity within the Philippine forestry sector has been trending downward since 1988. The 1991 timber cut is forecast at a record low 2.3 million CUM, down 8 percent from last year, and just under the 1991 allowable cut of 2.385 million CUM set by the Department of Environment and Natural Resources (DENR).

Current assessments indicate that total forest cover in the Philippines is 4.2 million hectares. Virgin forest is estimated at only 800,000 hectares, down 100,000 hectares from 1989. Of the 3.4 million hectares of residual forest, about 1.9 million hectares of regrowth forest have had sufficient regeneration, or were logged lightly enough in the first cut, to be considered productive forest with a sustainable annual production volume of approximately 3.0 million CUM. The remaining 1.5 million hectares are largely non-productive.

On average, 120,000 hectares of forest are denuded every year. A reforestation target level is set annually by the DENR. The target level for 1990 was 150,000 hectares. Actual replantings totaled a record 191,663 hectares. Currently, there is some concern as to the viability of these plantings given the extended dryness experienced from late 1990 through May of 1991.

Beginning January 1, 1992, logging in virgin forests will be strictly prohibited. Approximately one-half of this area is located within concessions belonging to existing Timber License Agreement (TLA) holders. In an effort to better manage its forest resources, the DENR has been gradually reducing the number of TLA holders. As of May 1991, there were only 63 TLA holders, down from 142 in 1986. The DENR's original target was to reduce the total number of TLA holders to 30 by the end of 1991. However, this target has been revised upward to 50 to encompass those TLA holders who have evidenced a strong commitment to proper forest management.

To date, the Government has not resolved the major issue confronting the domestic forest industry--the proposed ban on commercial logging. Delays in enacting the necessary legislation stem from disagreement within the Congress as to whether the final bill should stipulate a "total" logging ban with harvesting restricted to tree plantations, or a "selective" ban with harvesting permitted in all areas identified as having more than 40 percent forest cover. Whichever type of logging ban is imposed, it appears probable that production levels will continue to decline. Preliminary forecasts indicate output of tropical hardwood logs, lumber, and veneer will drop to an all-time low in 1991. The absence of a definitive resolution to the proposed ban has brought investment in logging and wood processing to a standstill. In order to compete on world markets, Philippine sawmills and processing plants desperately need investment funds to upgrade equipment and improve product quality.

TABLE 25. THE PHILIPPINES FORESTRY PRODUCTION
(1,000 Cubic Meters)

	1989	1990	1991 1/
HARVEST	3,217	2,500	2,300
Tropical Hardwood Logs	3,147	2,400	2,200
Tropical Hardwood Lumber	975	774	700
Tropical Hardwood Plywood	353	467	400
Tropical Hardwood Veneer	65	50	45

1/ Preliminary.

MYANMAR: The 1991 harvest is forecast at 31.3 million CUM, the bulk of which is fuelwood. Production of teak logs is forecast at 706,000 CUM, 17 percent above the Government's 1991 allowable cut of 603,000 CUM, but 5 percent less than the 1990 volume, due to declining reserves in the State's main producing areas of Pegu, Mandalay, and Sagaing. Fellings of teak logs from the Thai concession areas are expected to increase during 1991, but not enough to offset the smaller-than-anticipated harvest from the State's reserve forests. Overcutting of teak will probably continue as long as the Government's top priority is to maximize foreign exchange earnings.

Myanmar's timber reserves boast numerous other exotic tropical hardwoods, the most important of which are pyinkado, inn-kanyin, and padauk. Production of these non-teak hardwood logs is expected to exceed 3.6 million CUM in 1991, up 8 percent from last year. The Government set the 1991 allowable cut for non-teak hardwoods at 4.1 million CUM. Although fellings are expected to be 11 percent below target, they are rapidly approaching the sustainable limit. Production levels reportedly will continue to rise as Government policies increasingly mandate the substitution of exotic hardwoods for teak.

Sawnwood production for 1991 is forecast at 423,000 CUM, a 19 percent increase over 1990. Output of lumber, veneer and plywood processed from teak and other hardwoods is expected to rise in line with strong demand from domestic and overseas markets.

TABLE 26. MYANMAR FORESTRY PRODUCTION
(1,000 Cubic Meters)

	1989	1990	1991 1/
HARVEST	29,533	30,692	31,303
Teak Logs	729	747	706
Non-Teak Hardwood Logs	2,406	3,391	3,661
Teak Sawnwood	99	122	141
Non-Teak Hardwood Sawnwood	187	233	282

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FIELD TRIP REPORT ON SOVIET SPRING WHEAT SITUATION

A team led by the USDA traveled in the primary Soviet spring wheat regions of Kazakhstan and West Siberia during mid-August. The itinerary included the major spring wheat producing areas of the New Lands, including regions of the Kazakhstan Republic (Kustanay and Tselinograd oblasts) and West Siberia (Altay Kray). The objective of the team was to assess 1991 Soviet Spring Wheat production and to study grain production methodologies in the spring wheat areas. The team traveled under the auspices of the U.S.-U.S.S.R. Agreement on Cooperation in the Field of Agriculture.

Information obtained by crop observations and discussions with producers supported the USDA September estimate of 85.5 million tons for Soviet 1991 total wheat production. Soviet officials and farm managers reported that the area sown to grains this year is nearly identical to last year and is expected to stabilize after falling since the late 1970's. Crop conditions varied dramatically between and within areas visited, reflecting this season's severe drought and scattered rainfall. Spring wheat was in poor-fair condition in most areas with higher yields observed as the team traveled further north and east. West Siberia and Kazakhstan account for approximately 60 percent of the total Soviet spring wheat crop. Spring wheat accounts for roughly 30 percent of all Soviet wheat production.

The prospect of selling grain to the Government (procurement) was viewed with uncertainty by producers for the second year in a row. Procurements of grain by the State have been proceeding slowly, with sales, as of early September, reaching only 31 million tons with a 1991 procurement target of 77 million. The USDA team encountered little enthusiasm from State and collective farm managers relative to the hard-currency-for-grain program. Barter seems to be a way of life for many operations as a means to obtain desired products. Although many decrees have been announced by officials in Moscow, implementation has been difficult and life down on the Sovkhoz appears to go on as it has in the past.

Observations

- Discussions with the Ministry of Agriculture in Moscow indicated that 1991 would be an average grain production year for the Soviet Union, with spring grains being reduced from 1990.

- The total area sown to all grains this year was indicated to be nearly identical to last year and is expected to stabilize after falling since the late 1970's.

- The Ministry reported that next year's (1992/93) winter crops area is expected to reach 40 million hectares, up from the 1991 level of 35 million.

- Good agronomic principles were being applied everywhere observed; however, weeds were a problem in some locations due to the lack of herbicides.

- The spring wheat production regions visited did not report any significant shortage of fuel this year; however, they did report a shortage of quality plant protectants.

- Standard wheat varieties, dating from the 1950's, are still dominant due to their drought tolerance. The team noted that newer varieties are only slowly being accepted by farm managers.

- Research in Kazakhstan shows little advantage in employing fallow rotation over simple good management, such as deep plowing, snow retention, balanced fertilizer application, and the use of proper plant protectants.

- Four basic methods for weed control were observed in the New Lands: narrow row spacings, deep tillage practices, tall varieties, and crop rotations.

- The land privatization program is proceeding slowly in the areas visited.

- USDA satellite imagery analysis and meteorological data were strongly supported by the team's ground truth assessment of spring wheat yields.

Moscow

- Officials provided details concerning the reduced prospects for the 1991 spring wheat crop.

- This summer's drought in the New Lands was considered by many to be the worst in recent history. Many areas received little or no rain from May until mid-July.

- The all-grain area for 1991 is nearly identical to last year.

- The Ministry stated that the general trend in crop area across the New Lands is for more forage and less spring wheat area.

- The shortage of quality plant protectants this year is primarily due to insufficient hard currency to pay for imports.

West Siberia

- Spring wheat conditions looked the best here of all locations visited, with an estimated yield for the oblast reported at 1.2 tons per hectare.

- The season was dry in the west and south, and wet in the east, with the city of Barnaul being the dividing point.

- No shortage of fuel or fertilizers was reported in this region.

- Direct combining is gaining popularity over the traditional 2-stage (swath/combine) method. Yield gains of up to 10 percent have been reported.

- New seed often is often purchased only once every 3-5 years.

- The low average annual precipitation precludes intensive fertilizer application and often inhibits fertilizer efficiency. Some wheat operations apply fertilizer only once every 2-4 years.

- Fodder crop experimentation, with unexpectedly good results at this latitude, was evident. Early maturing corn and sorghum varieties from Krasnodar, Moldavia, Hungary, and Yugoslavia are being tested.

- Lack of adequate on-farm storage facilities is a problem here as well as in most areas visited.

Kazakhstan

- A severe drought sharply reduced yield prospects for this year's spring wheat crop. Little or no rain reportedly fell from the May planting period through the reproductive period in mid-July.

- Grain production in Kazakhstan reportedly will be down sharply from last year's bumper harvest of 28.5-million-tons (dry-weight basis) and will be one of the lowest in recent history.

- Local officials indicated that there will be sufficient grain to meet Kazakhstan's internal requirements. Kazakhstan has prohibited the sale of grain outside its borders.

- The decision of many farm managers to delay spring wheat sowing by 5-10 days and plant at a deeper depth generally is paying off in terms of higher yields and will allow some areas to harvest an average crop.

- For spring wheat, narrow (6-inch) row spacing, extremely high seeding rates, and seeding with disc drills were observed as efforts to shade the ground and thus combat weeds.

- Topsoil organic matter content may be expected to decline should current cultivation practices continue. These practices include disc drilling (requiring minimal surface residue), deep tillage, and the removal of crop residue for use as livestock feed.

- In mid-August, spring wheat was about 10-14 days from harvest. The growth stage was milky ripe to soft dough.

- Extremely variable crop conditions were observed. Yield estimates by team members and local officials for spring wheat ranged from 0.5 tons to 1.0 tons per hectare.

- More grain is being held on-farm due to a lack of confidence in the economy, despite inadequate storage facilities.

- Snow retention practices during the winter are of great importance in northern Kazakhstan, where a reported 80 percent of the moisture needed during the wheat vegetative period is derived from snow-melt.

- There was no reported shortage of fuel supplies.

- The lack of plant protectants was discussed. Weedy fields were observed.

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TABLE 27

Kazakhstan Total Grains: Area, Yield, and Production

Year	Area Harvested (MILLION HECTARES)	Yield (TONS PER HECTARE)	Production (MILLION TONS)
1980	25.3	1.09	27.5
1981	25.6	0.93	23.8
1982	25.4	0.77	19.5
1983	25.3	0.92	23.2
1984	25.4	0.62	15.7
1985	25.1	0.85	21.3
1986	24.6	1.15	28.3
1987	24.5	1.12	27.4
1988	24.3	0.93	22.6
1989	23.8	0.85	20.2
1990	23.4	1.33	31.2

Production figures are on a bunker–weight basis.

TABLE 28

USSR: TOTAL GRAIN PRODUCTION AND PROCUREMENT BY REPUBLIC /1

1986 – 1990

(1,000 METRIC TONS)

REPUBLIC	PRODUCTION 1986	1987	1988	1989	1990	AVG 86–90	% OF TOTAL	PROCUREMENTS AVG 86–90	% OF TOTAL
RSFSR	117,968	109,084	102,807	112,360	127,000	113,844	53.5	34,393	50.4
UKRAINE	43,063	50,184	47,388	54,900	53,200	49,747	23.4	17,079	25.0
MOLDAVIA	2,044	2,011	3,052	3,538	2,600	2,649	1.2	586	0.9
BELORUSSIA	7,041	9,281	6,922	7,900	8,200	7,869	3.7	1,600	2.3
KAZAKHSTAN	28,306	27,444	22,560	20,200	31,200	25,942	12.2	11,738	17.2
BALTICS:	6,164	6,897	5,050	6,324	6,800	6,247	2.9	952	1.4
LITHUANIA	3,155	3,554	3,046	3,537	3,600	3,378	1.6	450	0.7
LATVIA	1,850	2,086	1,413	1,715	2,000	1,813	0.9	347	0.5
ESTONIA	1,159	1,257	591	1,072	1,200	1,056	0.5	156	0.2
TRANS–CAUCASUS:	2,035	2,057	2,504	1,607	2,400	2,121	1.0	497	0.7
GEORGIA	638	664	714	535	700	650	0.3	92	0.1
ARMENIA	331	274	373	214	300	298	0.1	65	0.1
AZERBAIDZHAN	1,066	1,119	1,417	858	1,400	1,172	0.6	341	0.5
CENTRAL ASIA:	3,447	4,443	4,775	4,071	4,400	4,227	2.0	1,302	1.9
UZBEK	1,248	1,822	2,200	1,607	2,000	1,775	0.8	862	1.3
KIRGIZ	1,633	1,909	1,758	1,714	1,600	1,723	0.8	275	0.4
TADZHIK	246	359	382	322	300	322	0.2	65	0.1
TURKMEN	320	353	435	428	500	407	0.2	100	0.1
TOTAL USSR	210,068	211,401	195,058	210,900	235,800	212,645	100.0	68,237	100.0

/1 PUBLISHED SOVIET DATA

PRODUCTION ESTIMATES & CROP ASSESSMENT DIVISION, FAS, USDA

COTE D'IVOIRE GRAIN PRODUCTION

Total 1991/92 grain production in the Cote d'Ivoire is estimated at a record 1.36 million tons, up 5 percent or 60,000 tons from last year. The area devoted to d'Ivoire's food grains has increased more than 50 percent since the early 1980's. Total grain area reached a record 1.42 million hectares this year. Government initiatives to achieve self-sufficiency in domestic food grain production have led to area and production increases for rice, corn, millet, and sorghum. Ivorian rice production has increased nearly 75 percent since 1980. Corn production has increased more than 40 percent since 1980 with millet and sorghum output rising more than 60 percent in the same period. However, in spite of Government efforts, increases in grain production continue to be offset by the rising demands of a growing urban population.

RICE

The Cote d'Ivoire is expected to produce a record 0.73-million-ton (rough-basis) rice crop in 1991/92, due to an estimated record planted area and improved yields. Since 1980, the Government has implemented various programs aimed at boosting production by increasing planted area and providing technical assistance to farmers. In 1985, the Government undertook emergency actions to attain self-sufficiency in rice production. In spite of some initial success, high production costs and low-cost rice imports have tended to constrain continued output increases. In addition, financial problems faced by the Government have forced the suspension of free seed distribution to farmers. Instead, seed is sold to farmers at subsidized prices and fertilizer is provided free only to irrigated farms.

Area expansion and improved yield prospects for rice are expected to boost production during 1991/92; however, the decision to suspend the free supply of seed may moderate the increase. Many farmers planted this year's rice crop with seed left from prior harvests rather than purchasing quality seed. Another deterrent to further long-term production increases is harvest loss due to bird damage. Yield losses to birds reportedly average 20 percent each year.

Both upland and irrigated rice are produced in the Cote d'Ivoire, with upland rice accounting for 95 percent of the total area cultivated. Rice planting extends from April through July. Harvest begins in September and continues through December. Upland rice production is concentrated in areas where rainfall is adequate and well distributed, including the north and north-west savannah, the western forest zone, the Center-West, and the South. Irrigated rice is produced in areas of minimal or irregular rainfall, e.g., the Northeast and central Cote d'Ivoire at the transitional zone between savannah and forest.

Rice production has increased in recent years as a result of Government-sponsored technical direction, infrastructure improvements, and increased use of high yielding seed. Additional Government efforts include modernizing the production system, rehabilitating and equipping irrigated areas, and cultivating lowland areas and large plains. The emphasis of upland rice policy is on the establishment of optimal cultivation dates, regionalization of rice varieties, and reclamation of water logged lands. Irrigated rice policy focuses on the rehabilitation of existing hydroelectric projects, expansion of the area under technical supervision, and construction of additional dams.

CORN

Corn production for 1991/92 is estimated at 0.54 million tons, up from 0.49 million last year. Corn is produced throughout the Cote d'Ivoire, with the primary production areas in the northern half of the country. The main corn crop is planted from March to June and harvested from July through October. A secondary crop is planted in August and harvested in December. Ivorian soils are relatively fertile, allowing for the limited use of fertilizers, which are expensive and difficult to obtain. Cultivation is done predominantly by human labor, with some use of draft animals.

Production has increased steadily over the past decade as the Government has encouraged area expansion, increased area under technical supervision, established a favorable official producer price, and improved storage facilities. Several obstacles exist which limit corn production potential. Corn is produced for human consumption and as a feed grain. The demand for mixed feed has been low because of financial instability within the poultry industry, and locally produced corn often fails to meet the quality requirements established by mixed feed producers. Growth in the corn sector is also limited because of market restrictions. Corn export markets are few because neighboring countries, which were potential export markets, are now generally self-sufficient.

The goal of the Government corn policy is to improve productivity, marketing, and the promotion of industrial processing. The minimum producer price for corn has remained the same since July 1988. High storage costs and inadequate storage facilities has led small farmers to sell at a lower price during harvest to avoid quality deterioration. The Government has traditionally provided free seed to farmers, but, this practice was suspended this year. Seed is currently sold to farmers at subsidized prices.

MILLET AND SORGHUM

Millet production for the 1991/92 crop year is estimated at 59,000 tons, up 4 percent from last year due to an attractive market price, favorable early season rainfall, and area expansion. Sorghum production, which is estimated at 34,000 tons, up 6 percent from 1990/91, is also expected to rise based on increased area and favorable weather. Millet and sorghum are produced primarily in the savannah belt of northern Cote d'Ivoire. Planting is underway in May and continues until July. Harvest occurs between September and December. Producers utilize traditional management practices and receive little technical supervision. Both millet and sorghum have low priority in the Government's food production program and are produced as subsistence crops, although surplus grain is frequently marketed. Both are produced mainly for human consumption and are processed as a local food paste or traditional beer.

AGRICULTURAL PROFILE

Agriculture contributes roughly 30 percent of the Cote d'Ivoire's gross domestic product and provides employment for more than 50 percent of the population. Cote d'Ivoire is a major exporter of specialty crops such as cocoa, coffee, rubber, palm oil, and cotton. Cocoa and coffee production generate the majority of Cote d'Ivoire's export earnings, and the country's economy has been seriously affected by falling world market prices for these commodities. Cote d'Ivoire is self-sufficient in the production of most food crops such as cassava, millet, sorghum, and yams, although imported rice is needed to supplement local production. The area planted to rice has risen steadily during recent years. However, demands from a growing urban population have outpaced production increases, creating the need for continued imports.

The Ivorian government has traditionally been involved in virtually all facets of agriculture. Recently, however, serious economic problems have led the Government to liberalize the economy and to privatize some State-run agencies. The primary goals of current policy include: developing rural areas, modernizing agricultural activities, increasing food crop production (especially rice and corn), assuring favorable guaranteed producer prices, and promoting investment in agriculture.

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TABLE 29

Cote d'Ivoire Grains

	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92f
AREA HARVESTED					*(1,000 hectares)*							
RICE (rough)	360	340	350	380	411	420	509	540	595	620	630	640
CORN	468	490	520	550	595	533	600	590	640	650	620	650
MILLET	54	58	56	54	63	66	66	72	74	75	80	83
SORGHUM	36	34	35	33	37	36	36	38	44	45	46	48
TOTAL GRAINS	918	922	961	1017	1106	1055	1211	1240	1353	1390	1376	1421
YIELD					*(metric tons per hectare)*							
RICE (rough)	1.17	1.15	1.29	0.95	1.25	1.29	1.10	1.11	1.16	1.15	1.15	1.15
CORN	0.81	0.82	0.83	0.75	0.87	0.90	0.70	0.70	0.81	0.82	0.79	0.82
MILLET	0.63	0.55	0.54	0.48	0.65	0.61	0.61	0.63	0.65	0.68	0.71	0.71
SORGHUM	0.58	0.56	0.54	0.52	0.62	0.61	0.61	0.61	0.66	0.69	0.70	0.71
TOTAL GRAINS	0.93	0.91	0.97	0.80	0.99	1.03	0.86	0.87	0.95	0.95	0.95	0.96
PRODUCTION					*(1,000 metric tons)*							
RICE (rough)	421	390	451	359	514	541	561	598	691	711	725	734
CORN	380	400	430	410	520	480	420	415	520	530	490	535
MILLET	34	32	30	26	41	40	40	45	48	51	57	59
SORGHUM	21	19	19	17	23	22	22	23	29	31	32	34
TOTAL GRAINS	856	841	930	812	1098	1083	1043	1081	1288	1323	1304	1362

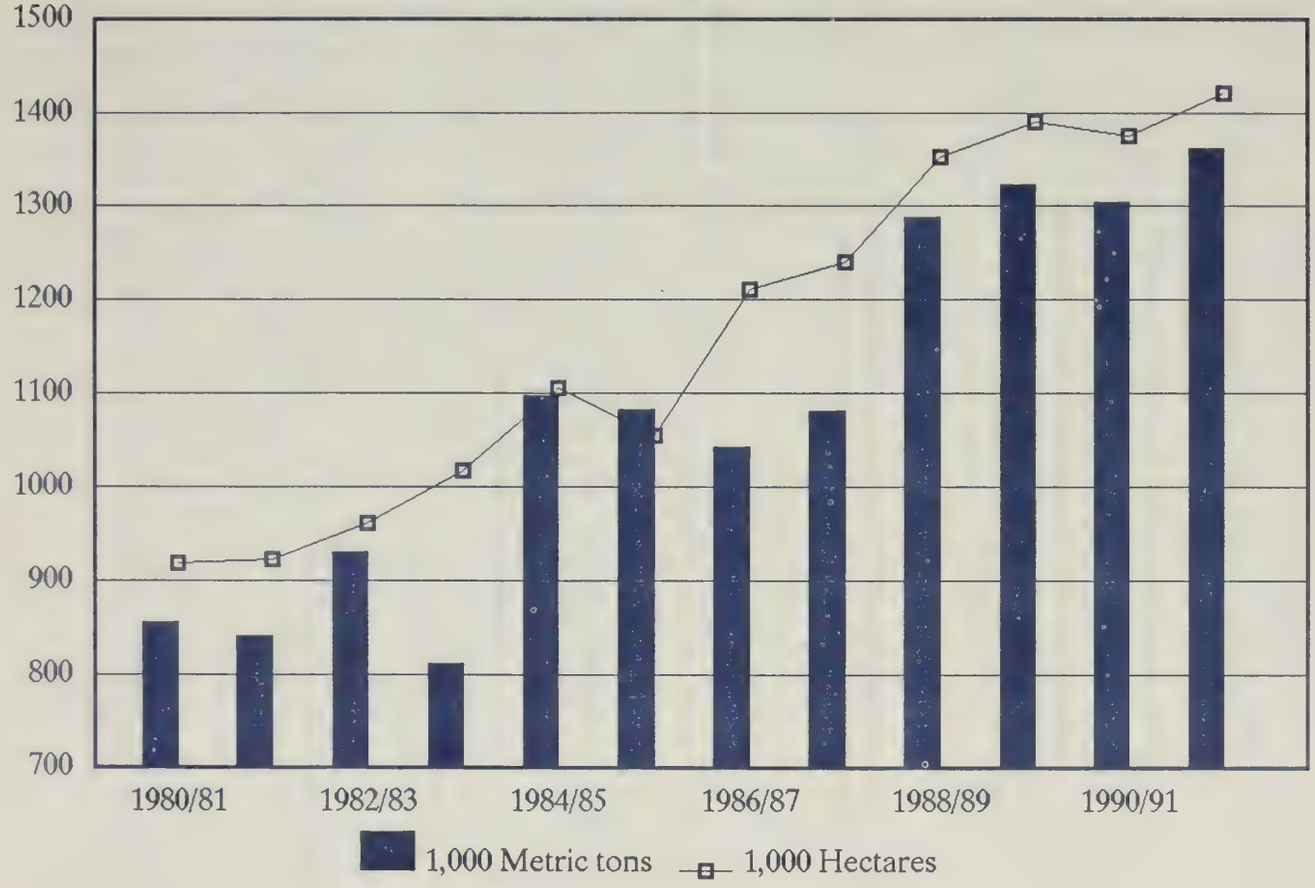
September 1991

Production Estimates & Crop Assessment Division , FAS, USDA

CHART 1

COTE D'IVOIRE GRAINS

AREA HARVESTED AND PRODUCTION



EAST EUROPEAN GRAIN PRODUCTION

Eastern Europe is projected to produce a total grain crop of 98.4 million tons for 1991, up 4.8 million or 5 percent from last year, but 5.3 million below the record 1984 harvest. Production trended upward throughout the 1970's and early 1980's, and peaked at a record 103.7 million tons in 1984. Over the past 7 years, production has fluctuated between 90.7 and 101.0 million tons. Harvested area, however, declined 3.1 million hectares since the early 1970's.

Eastern Europe, which is comprised of Albania, Bulgaria, Czechoslovakia, Hungary, Poland, Romania, and Yugoslavia, is expected to produce a wheat crop of 39.4 million tons in 1991, down 1.7 million or 4 percent from last year's record crop. Wheat is the largest grain crop produced in Eastern Europe making up roughly 40 percent of total grain production from 38 percent of total area planted to grains. Wheat area has generally fluctuated between 9 and 10 million hectares for the past 30 years while yields have steadily improved from a low of 1.62 tons per hectare in 1960 to a high of 4.32 in 1990. By comparison, the 1991 wheat yield in the European Community (EC) is estimated at 5.25 tons per hectare.

Coarse grain production in Eastern Europe for 1991 is estimated at 58.8 million tons, up 6.6 million or 13 percent from last year, but 6.5 million below the record 1984 harvest. Coarse grain area has trended downward since the early 1960's. Yields, however, have improved over the same period to a high of 3.83 tons per hectare in 1984 before slipping to an estimated 3.28 last year. Yields are expected to rebound because of improved weather in 1991, but remain well below peak levels. The EC's 1991 coarse grain average yield is estimated at 4.66 tons per hectare.

Rice production in Eastern Europe is relatively small and is estimated at 0.2 million tons (milled-basis) for 1991, down marginally from last year.

Albania

Total grain production in Albania is estimated at 0.9 million tons in 1991, marginally above last year. Area has changed little during the past 30 years, fluctuating between 0.3 and 0.4 million hectares. Grain crops cover almost 80 percent of the arable land, with wheat and corn being the most important crops. Wheat, which is produced in the central and northern regions, is estimated to total 0.5 million tons, unchanged from last year. Wheat area has remained in the 180,000 to 200,000 hectare range for the past ten years while yields have changed little over the same period. Corn production for 1991 is estimated at 0.4 million tons. Corn area has trended downward since the early 1960's; however, higher yields have more than made up for the decline in area and are expected to reach 4.0 tons per hectare this year.

Albania's soils and climate are most strongly influenced by the sharp topographic break between the western lowland strip and the surrounding mountains. Roughly 20 percent of the total land area is considered arable. The most fertile regions of the western lowlands are the provinces of Lushnja and Fieri, and the river valleys and basins of central and eastern Albania. The lowland area is characterized by a mild climate with winter temperatures generally above freezing. The cool, maritime summers are usually quite dry and most precipitation falls in the autumn and winter. These conditions are well suited to the production of winter grains. Irrigation in Albania is negligible.

Bulgaria

Total grain production in 1991 is estimated at 7.7 million tons, down marginally from last year and down 2.3 million from the record 1982 crop. Grain area has ranged from 2.5 to 1.8 million hectares since the early 1960's. Wheat production for 1991 is estimated at 4.3 million tons, down 0.8 million from last year and 1.1 million below the record 1989 crop. Harvested area has remained relatively constant for the past 10 years and has changed little since the early 1960's. Yields have demonstrated an upward trend since 1960 and have averaged 4.2 tons per hectare over the past 5 years. Wheat normally makes up more than half of the total grain area.

Coarse grain production is estimated at 3.3 million tons, up 0.6 million from last year, but down 1.7 million from the 1982 record of 5.0 million. Corn and barley are the major coarse grains produced, accounting for an estimated 1.9 and 1.3 million tons, respectively, in 1991. Corn output has been trending downward since the early 1980's due to reduced area and poorer yields. Barley production generally has been in the 1.0 to 1.7 million for range since 1970. Barley area and yields have shown large year-to-year fluctuations, but area is down from the mid-1970's while yields are up.

Bulgaria's climate is moderately continental but regionally variable. Frequent summer droughts, capable of causing severe yield fluctuations, have necessitated the extensive use of irrigation. Fertile soils and a varied climate, however, make the cultivation of a wide variety of crops possible. Wheat is grown nearly everywhere except in the extreme southwest, while corn is cultivated primarily in the northern third of the country.

Czechoslovakia

Total grain production in 1991 is estimated at 12.0 million tons, down approximately 0.4 million from last year's record. Harvested area has been declining slowly since the early 1970's. Yields have fluctuated but demonstrated a slight upward trend over the same period, resulting in a production level that generally has fluctuated between 10-12 million tons. Arable lands make up 40 percent of the total land area and grains cover slightly more than half of the cropped area.

Wheat and barley are Czechoslovakia's major grains and are produced primarily in the Elbe valley, the Moravian valleys, and the Slovakian lowlands. Wheat production for 1991 is estimated at 6.5 million tons, down 3 percent from last year's record. Wheat area has fluctuated relatively little for the past two decades while yields have improved steadily, finally leveling off at a 5.1 ton per hectare average over the past five years. Barley production is concentrated primarily in western Slovakia. Production for 1991 is estimated at 3.6 million tons, about 0.5 million below last year's record. Harvested area over the past three decades has fluctuated between 0.7 and 1.0 million hectares. During the past five years, barley area has returned to pre-1975 levels of between 0.7 and 0.8 million hectares. Yields have improved steadily since the early 1960's and have a 1986-90 average of 4.6 tons per hectare.

Hungary

Grain production for 1991 is estimated at 14.5 million tons, up 2.1 million from last year, but below the record of 15.5 million in 1984. Wheat and corn are the main grain crops in Hungary and together occupy roughly 82 percent of the estimated grain area.

Corn is Hungary's major crop with production for 1991 estimated at 6.7 million tons, up sharply from last year's drought-reduced harvest of 4.5 million. Corn yields improved steadily until the early 1980's, then leveled off and have fluctuated within the 5.5 to 6.7 tons per hectare range throughout the past decade. Harvested area has declined slightly from the level of the mid-1970's.

Wheat production for 1991 is estimated at 5.9 million tons from an area of 1.2 million hectares. While wheat area is estimated up 3 percent, production is down 4 percent from last year, and 20 percent below the record 1984 harvest. The condition of winter wheat and rye this year was better than the average of previous 5 years. Damage to winter grains this year was less than expected, despite extremely low temperatures in February. Freezing of standing water usually is the main cause of winterkill in Hungary and relatively low soil moisture during the first half of the winter resulted in less damage than normal. Rye production in Hungary is small at 0.2 million tons for 1991.

Barley production for 1991 is estimated at a record 1.6 million tons, up 0.3 million from last year. Some of the recently introduced, high-yielding winter barley varieties apparently are not as tolerant to freeze damage as the older varieties. Spring barley, on the other hand, has benefited from favorable weather, resulting in estimated total barley yields this year of 4.56 tons per hectare, second only to the record 4.68 produced in 1989.

Poland

Polish total grain output for 1991 is estimated at 27.4 million tons, down 0.6 million or 2 percent from last year's record crop. Area planted to grains has fluctuated only slightly during the past 15 years. Grain yields, which have a 10-year average of 3.0 tons per hectare, have shown some improvement in the past three years.

Wheat is the leading grain crop in Poland, surpassing rye in 1986. Wheat production for 1991 is estimated at 9.0 million tons, virtually unchanged from last year's record. Total coarse grain production is estimated at 18.4 million tons, down 0.6 million from last year's record. Rye production for 1991 is expected to reach 8.5 million tons, down 4 percent from 1990. Barley production for 1991 is projected at 4.2 million tons, unchanged from last year, but only 0.2 million tons below the record set in 1986.

Small grains -- wheat, rye, and barley -- are well suited to Poland's cool, moist climate and short summer growing season. Most grains are grown in a broad east-west zone in central Poland, which represents about 40 percent of all cultivated land. Wheat area is estimated to account for 28 percent of total 1991 grain area, and rye 35 percent. Wheat is more commonly grown in the south and production has risen at the expense of rye and oats. Oats tend to predominate on the soils of the northern lake region, and barley is concentrated in the central and southeastern areas. Virtually all barley grown in Poland is spring-planted, versus only a quarter of the wheat being spring grown.

Polish soils require fertilizers to achieve satisfactory yields. About 50 percent of Polish soils have a low phosphorous and potash content. Over 70 percent of the soils are light, and about 60 percent require regular liming. Basic crop production inputs are quite expensive. Falling grain prices caused fertilizer purchases for the 1991 crop to decline significantly last autumn. Purchases of plant protection chemicals also have been reduced from the 1989 level due to high prices. Reduced use of fertilizers and plant protection agents will likely contribute to lower yields for the 1991 crop.

Romania

Total grain production in Romania for 1991 is estimated at 18.9 million tons, up 1.0 million from last year, but down substantially from the record 1984 crop of 23.6 million. Grain harvested area has fluctuated between 5.6 and 6.5 million hectares during the last two decades.

Corn is the major grain produced in Romania followed, by wheat and barley. Corn production for 1991 is estimated at 8.5 million tons, up 1.0 million from last year, but down sharply from the record 13.3 million set in 1984. Corn yields improved steadily throughout the 1960's and 1970's, reaching a record 4.57 tons per hectare in 1982. Since then, corn yields trended downward and have averaged 3.4 tons per hectare over the past 5 years.

Wheat production is estimated at 7.0 million tons for 1991, down 0.3 million from last year and 1.4 million below the record set in 1988. Wheat yields have declined slightly from the record 3.5 tons per hectare produced in 1988. Wheat is produced throughout Romania, with the southern, eastern, and extreme western plains having the best agronomic conditions. Mostly soft and semi-hard winter wheat varieties are produced, with some hard wheat produced on the eastern plains. Barley production is projected at 3.0 million tons, up 0.3 million from last year because of higher area and yields. Barley yields trended upward over the past three decades, reaching a record 4.43 tons per hectare in 1989. Yields for 1991 are down from this high but above the 1986-1990 average. Poor crop management practices and the lack of timely input applications have negatively affected yields for all grains in recent years.

Romania's agricultural sector has been undergoing significant changes over the past few years. Land reform has been a major topic throughout 1990 and was finally adopted in March 1991. Originally, land was to be re-distributed in early May; however, a decision was made to delay the action until this fall. Many households have proceeded, nevertheless, to cultivate their own small plots, which may result in labor shortages on the collective farms later in the year. The most significant occurrence in 1990 was the liberalization of farmers' markets and the abolition of forced State marketing. State institutions this year have provided little assistance to the newly created "free markets", leading to excessive supplies in local areas, but unsatisfied distant demand.

Yugoslavia

Yugoslav total grain output for 1991 is estimated at 17.0 million tons, up 3.0 million from last year, but down 8 percent from the record 1986 crop. Harvested area has shown a downward trend since the early 1960's; however, higher yields generally have offset the lower area. Corn and wheat are the dominant grains produced, followed by barley and small amounts of rye, oats, sorghum, and rice.

Corn production for 1991 is estimated at 9.7 million tons, up sharply from last year's 6.6 million. Corn area has changed little over the last two decades while yields improved throughout this period until their peak with the record 5.3 tons per hectare in 1986. Yields have since declined to roughly 4.2 tons per hectare except for 1988 and 1990, both drought years.

Wheat area has shown a downward trend since the late 1960's, but yield gains have more than offset the area losses. Production this year is estimated at 6.2 million tons, down 2 percent from last year's record. Reduced soil moisture last fall prevented farmers from completely sowing their wheat during the optimal period (October 1-25) and in the southern area, most of the crop was planted after the optimal period. Abnormally warm weather and frequent rainfall during December and January enabled the crop to enter winter in good condition. Generally favorable weather throughout the spring and summer months promoted this year's near record output.

Grain production in Yugoslavia is primarily concentrated in the Pannonian Plains in the northeast, including parts of Croatia and Vojvodina. This region has a continental climate with variable rainfall patterns and contains the country's most fertile soils.

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TABLE 30

EAST EUROPEAN GRAIN PRODUCTION

(1000 METRIC TONS)

	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991 SEP
bania										
heat	524	583	600	575	560	560	540	540	450	450
arley	25	30	30	30	30	30	35	35	35	35
orn	342	366	360	360	360	360	400	400	380	400
ye	8	10	12	12	11	11	10	10	12	12
oarse Grains	405	436	432	432	431	431	475	475	457	477
otal Grains	929	1019	1032	1007	991	991	1015	1015	907	927
ulgaria										
heat	4913	3600	4836	3068	4327	4149	4743	5402	5095	4300
arley	1436	1047	1279	800	1144	1091	1313	1568	1345	1345
orn	3418	3115	2994	1350	2848	1858	1557	2421	1241	1850
ye	34	31	37	49	50	45	50	45	45	45
oarse Grains	4939	4224	4336	2241	4085	3036	2974	4080	2677	3282
otal Grains	9927	7898	9244	5364	8488	7261	7793	9558	7848	7658
zechoslovakia										
heat	4606	5820	6170	6023	5305	6154	6550	6356	6715	6500
arley	3654	3276	3677	3538	3530	3551	3400	3550	4051	3550
orn	941	722	940	1114	992	1160	950	1000	508	880
ye	583	751	710	620	547	496	530	708	729	650
oarse Grains	5669	5224	5812	5695	5479	5607	5240	5588	5702	5480
otal Grains	10275	11044	11982	11718	10784	11761	11790	11944	12417	11980
ungary										
heat	5751	5968	7367	6578	5793	5748	6975	6509	6159	5900
arley	865	1008	1208	1046	857	794	1170	1324	1300	1550
orn	7752	6256	6514	6818	7261	7234	6028	6747	4530	6650
ye	115	136	192	166	172	186	245	200	226	223
oarse Grains	8850	7518	8065	8163	8416	8313	7577	8401	6214	8553
otal Grains	14649	13534	15465	14789	14257	14109	14600	14944	12419	14499
oland										
heat	4476	5165	6010	6461	7502	7942	7582	8462	9026	9000
arley	3647	3262	3555	4086	4412	4335	3804	3909	4217	4217
orn	68	64	57	69	113	146	204	244	290	250
ye	7792	8781	9540	7600	7074	6816	7232	8620	8765	8450
oarse Grains	16690	16935	18382	17281	17534	17101	16922	18496	18988	18412
otal Grains	21166	22100	24392	23742	25036	25043	24504	26958	28014	27412
omania										
heat	6465	5220	7578	5665	6700	6000	8400	7800	7300	7000
arley	3052	2193	2448	1850	1950	1800	3000	3400	2700	3000
orn	12620	11982	13274	10500	12000	10500	10000	9000	7500	8500
ye	40	40	50	50	60	50	60	78	68	70
oarse Grains	15823	14314	15890	12510	14180	12470	13250	12654	10513	11820
otal Grains	22334	19618	23579	18313	21057	18624	21810	20522	17876	18880
goslavia										
heat	5218	5524	5595	4839	4776	5272	6300	5599	6359	6219
arley	669	661	748	704	703	504	615	702	692	700
orn	11126	10719	11293	9896	12526	8863	7697	9415	6616	9700
ye	84	83	81	77	74	69	76	75	72	75
oarse Grains	12152	11716	12382	10933	13569	9671	8646	10474	7663	10758
otal Grains	17412	17280	18013	15808	18393	14991	14983	16100	14062	17009
ast Europe										
heat	31953	31880	38156	33209	34963	35825	41090	40668	41104	39369
arley	13348	11477	12945	12054	12626	12105	13337	14488	14340	14397
orn	36267	33224	35432	30107	36100	30121	26836	29227	21065	28230
ye	8656	9832	10622	8574	7988	7673	8203	9736	9917	9525
oarse Grains	64528	60367	65299	57255	63694	56629	55084	60168	52214	58782
otal Grains	96692	92493	103707	90741	99006	92780	96495	101041	93543	98365

TABLE 31

EAST EUROPEAN GRAIN AREA

(1000 HECTARES)

	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991 SEP
Albania										
Wheat	195	189	190	190	190	190	180	180	180	180
Barley	12	13	13	13	13	13	13	13	13	13
Corn	92	87	90	90	90	90	95	95	100	100
Rye	10	11	11	11	11	11	12	12	12	12
Coarse Grains	134	131	134	134	134	134	140	140	145	145
Total Grains	329	320	324	324	324	324	320	320	325	325
Bulgaria										
Wheat	1059	1128	1126	1067	1127	1085	1182	1138	1163	1100
Barley	352	323	315	260	318	295	345	360	360	360
Corn	621	596	542	435	573	497	490	563	400	475
Rye	23	25	26	32	30	30	30	30	30	30
Coarse Grains	1040	979	907	757	950	851	893	980	817	892
Total Grains	2115	2123	2049	1837	2093	1952	2091	2134	1996	2008
Czechoslovakia										
Wheat	1073	1192	1209	1221	1213	1217	1250	1241	1241	1250
Barley	967	822	790	799	821	840	820	752	743	750
Corn	183	204	235	224	217	220	215	204	140	220
Rye	176	203	197	182	156	142	155	175	171	170
Coarse Grains	1498	1383	1362	1331	1303	1322	1305	1233	1145	1240
Total Grains	2571	2575	2571	2552	2516	2539	2555	2474	2386	2490
Hungary										
Wheat	1310	1355	1361	1358	1318	1301	1281	1242	1121	1150
Barley	262	277	270	279	253	205	264	283	297	340
Corn	1130	1102	1107	1053	1118	1144	1103	1084	1070	1119
Rye	74	72	75	85	89	94	97	97	92	93
Coarse Grains	1516	1499	1496	1461	1501	1483	1506	1506	1507	1594
Total Grains	2839	2867	2870	2834	2834	2799	2799	2760	2640	2756
Poland										
Wheat	1456	1537	1707	1885	2025	2132	2179	2195	2281	2375
Barley	1236	1099	1054	1242	1335	1286	1250	1175	1174	1255
Corn	16	17	15	16	22	32	40	51	45	50
Rye	3273	3448	3545	3083	2760	2647	2874	2924	3063	3000
Coarse Grains	6638	6571	6452	6319	6213	5940	6259	6181	6236	6255
Total Grains	8094	8108	8159	8204	8238	8072	8438	8376	8517	8630
Romania										
Wheat	2151	2232	2360	2355	2530	2400	2400	2350	2250	2200
Barley	943	741	672	680	575	560	750	768	750	800
Corn	2764	2935	3091	3090	3000	2900	2900	2800	2500	2350
Rye	40	42	35	40	40	42	40	40	35	35
Coarse Grains	3850	3804	3881	3891	3695	3582	3777	3725	3439	3343
Total Grains	6022	6064	6274	6284	6270	6029	6225	6124	5729	5581
Yugoslavia										
Wheat	1558	1609	1458	1348	1346	1455	1506	1479	1495	1533
Barley	284	280	271	264	267	213	222	242	245	250
Corn	2246	2264	2331	2400	2369	2218	2269	2268	2213	2300
Rye	53	51	47	44	42	41	40	37	38	38
Coarse Grains	2762	2766	2805	2862	2834	2614	2668	2693	2637	2730
Total Grains	4329	4384	4272	4219	4189	4079	4183	4178	4141	4269
East Europe										
Wheat	8802	9242	9411	9424	9749	9780	9978	9825	9731	9788
Barley	4056	3555	3385	3537	3582	3412	3664	3593	3582	3768
Corn	7052	7205	7411	7308	7389	7101	7112	7065	6468	6614
Rye	3649	3852	3936	3477	3128	3007	3248	3315	3441	3378
Coarse Grains	17438	17133	17037	16755	16630	15926	16548	16458	15926	16199
Total Grains	26299	26441	26519	26254	26464	25794	26611	26366	25734	26059

TABLE 32

EAST EUROPEAN GRAIN YIELDS

(TONS PER HECTARE)

	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991 SEP
Albania										
Wheat	2.69	3.08	3.16	3.03	2.95	2.95	3.00	3.00	2.50	2.50
Barley	2.08	2.31	2.31	2.31	2.31	2.31	2.69	2.69	2.69	2.69
Corn	3.72	4.21	4.00	4.00	4.00	4.00	4.21	4.21	3.80	4.00
Rye	0.80	0.91	1.09	1.09	1.00	1.00	0.83	0.83	1.00	1.00
Coarse Grains	3.02	3.33	3.22	3.22	3.22	3.22	3.39	3.39	3.15	3.29
Total Grains	2.82	3.18	3.19	3.11	3.06	3.06	3.17	3.17	2.79	2.85
Bulgaria										
Wheat	4.64	3.19	4.29	2.88	3.84	3.82	4.01	4.75	4.38	3.91
Barley	4.08	3.24	4.06	3.08	3.60	3.70	3.81	4.36	3.74	3.74
Corn	5.50	5.23	5.52	3.10	4.97	3.74	3.18	4.30	3.10	3.89
Rye	1.48	1.24	1.42	1.53	1.67	1.50	1.67	1.50	1.50	1.50
Coarse Grains	4.75	4.31	4.78	2.96	4.30	3.57	3.33	4.16	3.28	3.68
Total Grains	4.69	3.72	4.51	2.92	4.06	3.72	3.73	4.48	3.93	3.81
Czechoslovakia										
Wheat	4.29	4.88	5.10	4.93	4.37	5.06	5.24	5.12	5.41	5.20
Barley	3.78	3.99	4.65	4.43	4.30	4.23	4.15	4.72	5.45	4.73
Corn	5.14	3.54	4.00	4.97	4.57	5.27	4.42	4.90	3.63	4.00
Rye	3.31	3.70	3.60	3.41	3.51	3.49	3.42	4.05	4.26	3.82
Coarse Grains	3.78	3.78	4.27	4.28	4.20	4.24	4.02	4.53	4.98	4.42
Total Grains	4.00	4.29	4.66	4.59	4.29	4.63	4.61	4.83	5.20	4.81
Hungary										
Wheat	4.39	4.40	5.41	4.84	4.40	4.42	5.44	5.24	5.49	5.13
Barley	3.30	3.64	4.47	3.75	3.39	3.87	4.43	4.68	4.38	4.56
Corn	6.86	5.68	5.88	6.47	6.49	6.32	5.47	6.22	4.23	5.94
Rye	1.55	1.89	2.56	1.95	1.93	1.98	2.53	2.06	2.46	2.40
Coarse Grains	5.84	5.02	5.39	5.59	5.61	5.61	5.03	5.58	4.12	5.37
Total Grains	5.16	4.72	5.39	5.22	5.03	5.04	5.22	5.41	4.70	5.26
Poland										
Wheat	3.07	3.36	3.52	3.43	3.70	3.73	3.48	3.86	3.96	3.79
Barley	2.95	2.97	3.37	3.29	3.30	3.37	3.04	3.33	3.59	3.36
Corn	4.25	3.76	3.80	4.31	5.14	4.56	5.10	4.78	6.44	5.00
Rye	2.38	2.55	2.69	2.47	2.56	2.57	2.52	2.95	2.86	2.82
Coarse Grains	2.51	2.58	2.85	2.73	2.82	2.88	2.70	2.99	3.04	2.94
Total Grains	2.62	2.73	2.99	2.89	3.04	3.10	2.90	3.22	3.29	3.18
Romania										
Wheat	3.01	2.34	3.21	2.41	2.65	2.50	3.50	3.32	3.24	3.18
Barley	3.24	2.96	3.64	2.72	3.39	3.21	4.00	4.43	3.60	3.75
Corn	4.57	4.08	4.29	3.40	4.00	3.62	3.45	3.21	3.00	3.62
Rye	1.00	0.95	1.43	1.25	1.50	1.19	1.50	1.95	1.94	2.00
Coarse Grains	4.11	3.76	4.09	3.22	3.84	3.48	3.51	3.40	3.06	3.54
Total Grains	3.71	3.24	3.76	2.91	3.36	3.09	3.50	3.35	3.12	3.38
Yugoslavia										
Wheat	3.35	3.43	3.84	3.59	3.55	3.62	4.18	3.79	4.25	4.06
Barley	2.36	2.36	2.76	2.67	2.63	2.37	2.77	2.90	2.82	2.80
Corn	4.95	4.73	4.84	4.12	5.29	4.00	3.39	4.15	2.99	4.22
Rye	1.58	1.63	1.72	1.75	1.76	1.68	1.90	2.03	1.89	1.97
Coarse Grains	4.40	4.24	4.41	3.82	4.79	3.70	3.24	3.89	2.91	3.94
Total Grains	4.02	3.94	4.22	3.75	4.39	3.68	3.58	3.85	3.40	3.98
East Europe										
Wheat	3.63	3.45	4.05	3.52	3.59	3.66	4.12	4.14	4.22	4.02
Barley	3.29	3.23	3.82	3.41	3.52	3.55	3.64	4.03	4.00	3.82
Corn	5.14	4.61	4.78	4.12	4.89	4.24	3.77	4.14	3.26	4.27
Rye	2.37	2.55	2.70	2.47	2.55	2.55	2.53	2.94	2.88	2.82
Coarse Grains	3.70	3.52	3.83	3.42	3.83	3.56	3.33	3.66	3.28	3.63
Total Grains	3.68	3.50	3.91	3.46	3.74	3.60	3.63	3.83	3.63	3.77

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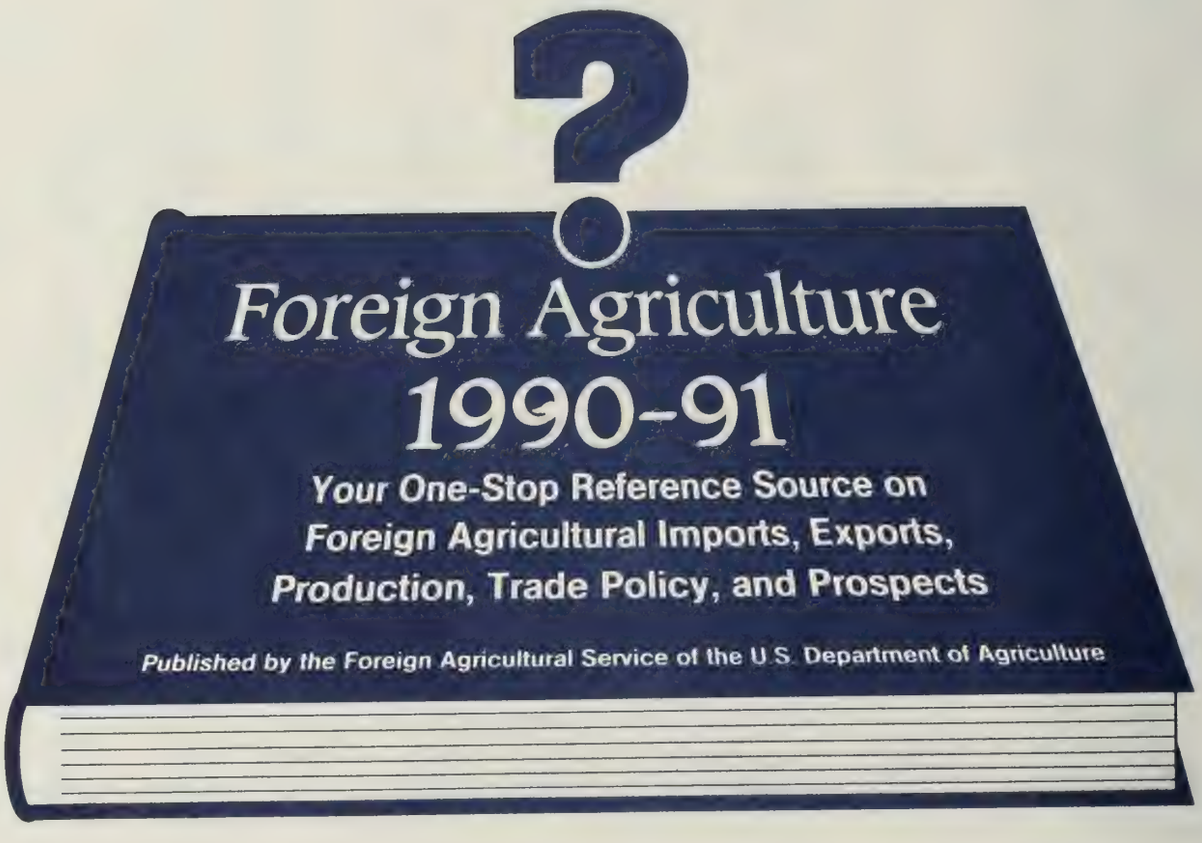

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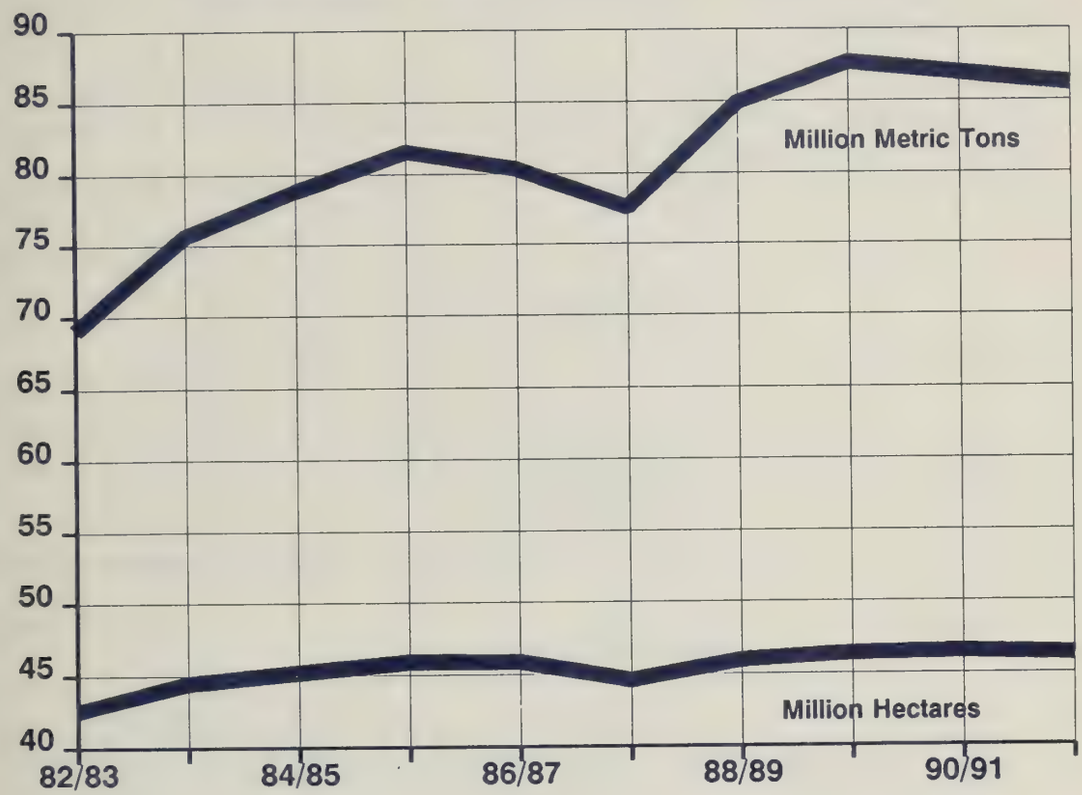
WAP 10-91
October 1991

World Agricultural Production

Southeast Asia : Grain Production



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- Southeast Asian Grain
- Indian Crop Conditions
- Deciduous Fruits
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This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-259), October 10, 1991.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 720-0888 or by FAX (202) 720-8880.

****
* The next issue of World Agricultural Production will be released at 3 p.m. *
* eastern time on November 13, 1991. *
****

CONVERSION TABLE

Metric Tons to Bushels		Metric Tons to 480-lb. Bales	
		Cotton	= MT*4.592917
Wheat & Soybeans	= MT*36.7437		
Corn, Sorghum, Rye	= MT*39.36825		
Barley	= MT*45.929625		
Oats	= MT*68.894438	Metric Tons to Hundredweight	
1 hectare	= 2.471044 acres	Rice	=MT*22.04622
1 kilogram	= 2.204622 pounds		

NOTE: BEGINNING WITH THE MAY EDITION, THIS CIRCULAR SERIES COMBINES DATA FOR THE TERRITORIES FORMERLY KNOWN AS EAST GERMANY (GDR) AND WEST GERMANY (FRG) UNDER THE HEADING GERMANY. LIKEWISE, DATA FOR THE TERRITORY FORMERLY CALLED EAST GERMANY (GDR) ARE INCLUDED IN AGGREGATES FOR THE EUROPEAN COMMUNITY (EC-12) AND EXCLUDED FROM AGGREGATES FOR EASTERN EUROPE. BECAUSE OF THIS, DATA FOR "GERMANY", EASTERN EUROPE, AND THE EUROPEAN COMMUNITY (EC-12) ARE NOT COMPARABLE WITH DATA PUBLISHED IN PRIOR EDITIONS OF THIS CIRCULAR SERIES AND MAY NOT BE COMPARABLE WITH SUCH ESTIMATES FOUND IN OTHER PUBLICATIONS OF THE U.S. DEPARTMENT OF AGRICULTURE.

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PRODUCTION HIGHLIGHTS FOR 1991/92

October 1991

WHEAT: World production for 1991/92 is estimated at 550.3 million tons, down 0.6 million or less than 1 percent from last month and down 7 percent from last year. Total foreign production is estimated at 496.4 million tons, up 0.2 million or less than 1 percent from last month and down 4 percent from last year. Country highlights are as follows:

- **United States** — Production is estimated at 53.9 million tons, down 0.9 million or 2 percent from last month and down 28 percent from last year. The reduction is due to lower area and yield estimates.

- **Soviet Union** — Production is estimated at 83.0 million tons, down 2.5 million or 3 percent from last month and down 23 percent from last year. Wheat yield estimates were reduced as result of this year's drought in the spring wheat region.

- **Australia** — Production is estimated at 11.0 million tons, down 0.5 million or 4 percent from last month and down 29 percent from last year. Drought in Queensland and New South Wales is responsible for the lowered prospective wheat yields.

- **EC-12** — Production is estimated at a record 90.3 million tons, up 1.9 million or 2 percent from last month and up 7 percent from last year. Higher yields in Greece, Belgium-Luxembourg, France, Germany, and Italy more than offset an estimated decrease in Denmark.

- **Other N. Africa** — Production is estimated at 8.1 million tons, up 0.6 million or 8 percent from last month and up 44 percent from last year. Record yields prospects in Morocco and Tunisia, due to favorable weather, are responsible for the increase.

- **Canada** — Production is estimated at 33.0 million tons, up 0.5 million or 2 percent from last month and up 1 percent from last year. Harvesting is nearly complete and initial results indicate a record crop.

- **Eastern Europe** — Production is estimated at 39.7 million tons, up 0.3 million or 1 percent from last month, but down 3 percent from last year. Higher than anticipated area and yields in Yugoslavia are the reason for the increase.

COARSE GRAINS: World production for 1991/92 is estimated at 800.3 million tons, up 5.3 million, a 1 percent increase from last month, but down 4 percent from last year. Total foreign production is estimated at 582.1 million tons, up 0.5 million or less than 1 percent from last month, but down 3 percent from last year. Country highlights are as follows:

- **United States** — Production is estimated at 218.3 million tons, up 4.8 million or 2 percent from last month, but down 5 percent from last year. The increase is due to higher yields for corn and sorghum which offset reductions in barley, oats, and rye.

- **Eastern Europe** — Production is estimated at 61.1 million tons, up 2.3 million or 4 percent from last month's estimate and up 17 percent from last year's drought-reduced harvest. The increase is due to greater estimated production of corn in Yugoslavia as a result of favorable July and August growing conditions.

- **EC-12** — Production is estimated at 88.2 million tons, up 0.7 million or 1 percent from last month and up 5 percent from last year. Higher-than-anticipated barley yields in Germany, Italy, France, Denmark, and Belgium-Luxembourg, along with increased oats yields in Germany, more than offset decreases in estimated corn yields in Italy, Spain, and Greece.

- **Morocco** — Production is estimated at 3.7 million tons, up 0.3 million or 10 percent from last month and up 38 percent from last year. Barley area decreased slightly from last year; however, abundant seasonal rainfall improved yields and increased production to a record level. Corn production suffered due to a lack of rainfall during the critical period from the end of April to the beginning of May. The increase in estimated barley production should more than offset the drop in corn production.

- **Syria** — Production is estimated at 1.0 million tons, up 0.3 million or 52 percent from last month's estimate and up 52 percent from last year. The increase is due primarily to greater estimate barley outturn.

- **India** — Production is estimated at 31.5 million tons, down 1.0 million or 3 percent from last month and down 5 percent from last year. Deficient rainfall in key rainfed growing regions of north India have significantly decreased estimated corn area and yield. Millet yields are also forecast to decline significantly due to a lack of timely rainfall and to heat stress.

- **Soviet Union** — Production is estimated at 90.5 million tons, down 1.0 million or 1 percent from last month and down 20 percent from last year. The reduction of 1.0 million tons was due to reduced corn yield estimates.

- **Mexico** — Production is estimated at 16.3 million tons, down 0.5 million or 3 percent from last month and down 11 percent from last year. The decrease is due to reduced estimated sorghum outturn.

- **Indonesia** — Production is estimated at 5.2 million tons, down 0.2 million or 4 percent from last month, but unchanged from last year. The prolonged drought in Java cut area and yield estimates for corn as farmers have abandoned fields or cut their crop for fodder.

RICE (MILLED-BASIS): World production for 1991/92 is projected at 343.9 million tons, down 1.9 million or 1 percent from last year's record crop. Total foreign production in 1991/92 is projected at 338.9 million tons, down 1.9 million or 1 percent from last month and down 8.4 million or 2 percent from 1990/91. Country highlights are as follows:

- **United States** — Production is estimated at 5.0 million tons, virtually unchanged from last month, but down 1 percent from last year.

- **India** — Production is estimated at 71.5 million tons, down 1.5 million or 2 percent from last month and down 4 percent from last year's record harvest. Rice area declined an estimated 0.9 million hectares owing to drought in major northern growing states.

- **Soviet Union** — Production is estimated at 1.4 million tons, down 0.3 million or 15 percent from last month and down 8 percent from last year. The reduction is due to downward adjustments for both area and yield.

OILSEEDS: Total world oilseeds production during 1991/92 is forecast at a record 222.4 million tons, up 3.8 million or 2 percent from last month and up 2 percent from 1990/91. Foreign production during 1991/92 is forecast to be a record 159.7 million tons, up 0.7 million or less than 1 percent from last month and up nearly 2 percent from last year. Total oilseed production in the United States is forecast at 62.8 million tons, up 3.0 million or 5 percent from last month and up 3 percent from last year.

* **Soybeans:** World production for 1991/92 is forecast at 105.4 million tons, up 3.4 million or 3 percent from last month and up 2 percent from last year. Total foreign soybean output is forecast at 52.7 million tons, up 0.2 million or less than 1 percent from last month and up 4 percent from 1990/91. Country highlights are as follows:

- **United States** — Production is estimated at 52.6 million tons, up 3.2 million or 6 percent from last month and up slightly from last year. The National Agricultural Statistics Service, USDA, increased yield projections from last month, but held harvested area at 23.7 million hectares, up 4 percent from 1990/91. Better than expected yields are a result of timely rains in August and September over most of the Corn Belt.

- **India** — Production is estimated at a record 2.7 million tons, up 0.3 million or 13 percent from last month and up 11 percent from last year's record harvest. Soybean area is estimated up 11 percent, from 1990/91 continuing the expansion of this non-traditional oilseed in central India.

- **Indonesia** — Production is estimated at 1.3 million tons, down 0.1 million or 8 percent from last month and down 2 percent from last year. The prolonged drought in Java cut area and yield estimates.

* **Cottonseed:** World production for 1991/92 is forecast at 34.7 million tons, down 0.3 million or 1 percent from last month, but up 3 percent from last year. Total foreign production is forecast at 28.5 million tons, down 0.2 million or 1 percent from last month, but up 1 percent from last year. Country highlights are as follows:

  - **United States** — Production is estimated at 6.2 million tons, down 81,000 tons or 1 percent from last month, but up 14 percent from 1990/91. Official estimates by the National Agricultural Statistics Service this month reduced expected average yield and left harvested area unchanged at 5.4 million hectares, up 0.6 million from last year. Adverse conditions reduced production prospects, particularly in West and Eastern Texas, where cold temperatures diminished estimated yields.

  - **Soviet Union** — Production is estimated at 4.4 million tons, down 0.2 million or 4 percent from last month and down 11 percent from last year. The decrease in production is based on lower expected cotton yields.

  - **India** — Production is estimated at 4.3 million tons, up 0.1 million or 2 percent from last month and up 10 percent from last year. Harvested area is estimated down slightly, but cotton yields are expected to rise owing to overall favorable weather.

* **Peanuts:** World production for 1991/92 is forecast at 23.4 million tons, up 0.6 million or 2 percent from last month and up 2 percent from 1990/91. Total foreign production is forecast at 21.2 million tons, up 0.6 million or 3 percent from last month, but down slightly from last year. Country highlights are as follows:

  - **United States** Production is estimated at a record 2.2 million tons, down 40,000 tons or 2 percent from last month, but up 37 percent from 1990/91. The National Agricultural Statistics Service reduced average yield slightly and left harvested area unchanged at 795,000 hectares, up nearly 9 percent from 1990/91. Yield prospects in the Southwestern States were reduced by excessive wet conditions in August lowered by a lack of moisture in September.

  - **India** Production is estimated at 8.2 million tons, up 0.6 million or 8 percent from last month and up 1 percent from last year's drought affected crop. Peanut area is forecast at last year's level, with yields slightly above those achieved during last season's drought. The 1990/91 area and production estimate were also revised upward. Harvested 1990/91 area was increased from 8.1 million hectares to 8.7 million and output was increased from 7.3 million tons to 8.1 million.

* **Sunflowerseed:** World production for 1991/92 is forecast at 21.4 million tons, up 0.2 million or 1 percent from last month, but down 4 percent from 1990/91. Total foreign production is forecast at 19.9 million tons, up 0.2 million or 1 percent from last month, but down 6 percent from last year. Country highlights are as follows:

  - **United States** Production is estimated at 1.5 million tons, down 42,000 tons or 3 percent from last month, but up 45 percent from last year. Harvested area is estimated at 1.024 million hectares, up 37 percent from 1990/91.

  - **India** Production is estimated at a record 0.9 million tons, up 0.3 million or 50 percent from last month and up 9 percent from last year's harvest. Harvested area increased significantly owing to improved grower returns, while yields are forecast to rise due to generally favorable weather. Government estimates for 1990/91 now peg harvested area at 1.58 million hectares, up from 1.2 million and production at 0.85 million tons, up from 0.6 million.

  - **Morocco** Production is forecast at 0.1 million tons, down 0.1 million or 47 percent from last month and down 38 percent from last year. Area decreased due to intensive rainfall at planting. Yields also declined in response to unfavorable weather during the growing season.

* **Rapeseed:** World production for 1991/92 is forecast at a record 27.2 million tons, up marginally from last month and up 7 percent from last year. Total foreign production is forecast at 27.1 million tons, up marginally from last month and up 7 percent from last year. Country highlights are as follows:

  o **United States** Production is estimated at 105,000 tons, unchanged from last month, but nearly double that of last year. Area and production data for 1987/88 through the initial 1991/92 estimate are estimates from the Inter-agency Oilseeds Committee and the World Agricultural Outlook Board. The National Agricultural Statistics Service, USDA, is expected to announce its U.S. rapeseed area estimates in January 1992.

* **Flaxseed:** World production for 1991/92 is forecast at 2.0 million tons, down 3 percent from last month and down 12 percent from last year. While production in the United States is small, this year's output is expected to increase by 18 percent over 1990/91 to 114,000 tons. Total foreign production is pegged at 1.9 million tons, down 70,000 tons or 4 percent from September and down 13 percent from last year. There were no significant country changes this month.

* **Copra:** World production for 1991/92 is forecast at 4.7 million tons, down slightly from last month and down 1 percent from last year. Copra production reached a record 5.3 million tons in 1985/86. There were no significant country changes this month.

* **Palm Kernels:** World production for 1991/92 is forecast at a record 3.6 million tons, unchanged from last month, but up 9 percent from last year. There were no country changes this month.

* **Palm Oil:** World production for 1991/92 is forecast at a record 11.9 million tons, unchanged from last month, but up 8 percent from last year. There were no country changes this month.

COTTON: World cotton production in 1991/92 is projected at a record 90.7 million bales. This estimate is down 0.8 million bales or nearly 1 percent from last month, but up 3.8 million or 4 percent from 1990/91 and up from the previous record of 89 million bales harvested in 1984/85. Total foreign production is projected at 73.1 million bales, down 0.6 million bales or nearly 1 percent from last month, but represents a gain of 2 percent over 1990/91, second only to the 1984/85 record crop of 76 million bales. Country highlights are as follows:

  o **United States** Production is estimated at 17.6 million bales, down 0.2 million or 1 percent from last month, but 14 percent above last year. This is the largest crop since 1937/38 when output hit 18.9 million bales. The production decrease reflects an estimated 5 percent output drop in Texas and a slight downward revision of Alabama and North Carolina. Weather conditions in these states caused crop prospects to decline during the month.

- **Soviet Union** — Production is estimated at 11.0 million bales, down 0.3 million bales or 3 percent from last month and down 1.0 million or 8 percent from last year. The decrease in production is based on lower expected yield.

- **Mexico** — Production is estimated at 0.9 million bales, down 0.1 million or 11 percent from last month's estimate and down 14 percent from 1990/91. The drop reflects regional insect damage and heavy rains during harvest which decreased both area and yield estimates.

- **Iran** — Production is estimated at 0.5 million bales, down 0.1 million or 17 percent from last month's estimate and down 5 percent from 1990/91. Increasing production costs and manpower reductions contributed to the decline in both area and yield.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	1991/92	1989/90	1990/91	Sept.	Oct.	1989/90	1990/91	Sept.	Oct.
	--Million Acres--			--Million Acres--			--Bushels per Acre--				--Million Bushels--			
All Wheat	76.6	77.2	70.0	62.2	69.3	57.7	32.7	39.5	34.6	34.3	2,037	2,736	2,013	1,981
Winter	55.1	56.9	51.0	41.5	49.9	39.4	35.0	40.7	34.7	34.8	1,455	2,031	1,372	1,372
Other	21.5	20.3	18.9	20.7	19.4	18.3	28.1	36.4	34.5	33.3	582	706	641	609
Rye	2.0	1.6	1.7	0.5	0.4	0.4	28.2	27.1	27.6	24.6	14	10	12	10
Soybeans	60.8	57.8	59.8	59.5	56.5	58.6	32.3	34.1	31.0	33.0	1,924	1,926	1,817	1,934
Corn	72.2	74.2	75.9	64.7	67.0	68.7	116.3	118.5	106.1	108.8	7,525	7,933	7,295	7,479
Sorghum	12.6	10.5	11.0	11.1	9.1	9.7	55.4	62.9	56.2	58.2	615	571	548	567
Barley	9.1	8.2	8.9	8.3	7.5	8.4	48.6	56.1	55.5	55.2	404	422	468	464
Oats	12.1	10.4	8.7	6.9	5.9	4.8	54.3	60.1	52.2	50.6	374	358	260	243
							--Pounds per Acre--				--Million CWT--			
Rice	2.7	2.9	2.9	2.7	2.8	2.8	5,749	5,507	5,563	5,571	154.5	154.9	157.5	157.7
											--Million 480-Pound--			
All Cotton	10.6	12.3	14.1	9.5	11.7	13.4	614	634	638	630	12.2	15.5	17.9	17.6

1/ Except for estimated rye production, all estimates are from the USDA National Agricultural Statistics Service (NASS) for 1989/90, 1990/91 and 1991/92. Production and yield estimates for rye are from the USDA Interagency Commodity Estimates Committee.

TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			USSR	Asia					South America		Selected Other			All Other Countries
			United States	Canada	Mexico	EC-12	Oth. W. Europe	Eastern Europe		China	India	Indo-nesia	Paki-stan	Thai-land	Argen-tina	Brazil	Aus-tralia	South Africa	Turkey	
	—Million Metric Tons—																			
Wheat																				
1989/90	537.6	482.1	55.4	24.6	4.0	82.0	4.4	40.7	92.3	90.8	54.1	0.0	14.4	0.0	10.2	5.6	14.2	2.0	12.5	15.4
1990/91 prel.	593.6	519.1	74.5	32.7	3.9	84.7	5.1	41.1	108.0	98.2	49.7	0.0	14.3	0.0	10.5	3.2	15.4	1.7	15.0	17.8
1991/92 proj.																				
September	550.9	496.1	54.8	32.5	3.5	88.5	4.0	39.4	85.5	94.0	54.0	0.0	14.5	0.0	9.0	3.2	11.5	2.1	16.0	18.2
October	550.3	496.4	53.9	33.0	3.5	90.3	4.1	39.7	83.0	94.0	54.0	0.0	14.5	0.0	9.0	3.2	11.0	2.1	16.0	18.1
Coarse Grains																				
1989/90	802.6	581.3	221.4	23.5	14.1	89.8	12.4	60.2	104.8	93.5	34.6	5.0	2.7	4.3	8.3	22.5	6.8	9.5	7.5	81.7
1990/91 prel.	833.8	603.1	230.7	26.1	18.4	84.1	13.7	52.2	113.3	113.5	33.3	5.2	2.9	4.1	11.2	24.2	6.9	8.8	8.9	76.6
1991/92 proj.																				
September	795.1	581.6	213.5	23.6	16.8	87.5	11.8	58.8	91.5	103.6	32.5	5.4	2.5	4.0	10.2	26.7	7.3	8.6	9.7	81.1
October	800.3	582.1	218.3	23.5	16.3	88.2	11.9	61.1	90.5	103.6	31.5	5.2	2.5	4.0	10.2	26.7	7.3	8.6	9.7	81.3
Rice (Milled)																				
1989/90	344.6	339.5	5.1	0.0	0.4	1.4	0.0	0.1	1.7	126.1	74.1	29.1	3.2	13.3	0.2	4.9	0.7	0.0	0.2	23.2
1990/91 prel.	352.3	347.3	5.1	0.0	0.2	1.6	0.0	0.1	1.6	132.5	74.6	29.4	3.3	11.4	0.2	6.3	0.6	0.0	0.2	23.8
1991/92 proj.																				
September	345.8	340.8	5.0	0.0	0.2	1.5	0.0	0.1	1.7	127.4	73.0	28.9	3.3	13.2	0.2	6.8	0.8	0.0	0.1	23.1
October	343.9	338.9	5.0	0.0	0.2	1.5	0.0	0.1	1.4	127.4	71.5	28.9	3.3	13.2	0.2	6.8	0.8	0.0	0.1	23.1
Total Grains 1/																				
1989/90	1,684.8	1,402.9	281.9	48.0	18.5	173.2	16.8	101.0	198.8	310.4	162.7	34.1	20.4	17.6	18.7	33.0	21.7	11.5	20.2	196.4
1990/91 prel.	1,779.7	1,469.5	310.2	58.8	22.5	170.4	18.7	93.5	222.9	344.2	157.5	34.6	20.4	15.5	22.0	33.7	22.8	10.5	24.1	197.6
1991/92 proj.																				
September	1,691.7	1,418.5	273.2	56.1	20.5	177.5	15.8	98.3	178.7	325.0	159.5	34.3	20.3	17.2	19.4	36.7	19.6	10.7	25.9	203.2
October	1,694.5	1,417.3	277.2	56.5	20.0	180.1	16.0	100.9	174.9	325.0	157.0	34.1	20.3	17.2	19.4	36.7	19.1	10.7	25.9	203.6
Oilseeds 2/																				
1989/90	214.1	154.8	59.3	4.9	1.4	11.5	0.7	5.2	13.8	28.5	19.3	2.2	3.3	0.9	15.8	21.8	0.7	1.0	2.3	21.5
1990/91 prel.	217.5	156.9	60.6	5.6	1.0	13.0	0.7	4.3	13.0	33.2	21.0	2.2	3.6	0.7	16.1	17.0	2.0	1.0	1.9	20.4
1991/92 proj.																				
September	218.7	158.9	59.7	6.2	1.1	13.7	0.7	4.2	12.3	33.2	20.2	2.3	3.8	0.7	15.5	19.1	1.1	1.0	1.6	22.2
October	222.4	159.7	62.8	6.2	1.1	13.8	0.7	4.2	12.1	33.2	21.5	2.2	3.8	0.7	15.5	19.1	1.1	1.0	1.6	22.1
	—Million 480-Pound Bales—																			
Cotton																				
1989/90	80.0	67.8	12.2	0.0	0.8	1.5	0.0	0.1	12.3	17.4	10.6	0.0	6.7	0.1	1.3	3.0	1.4	0.3	2.8	9.5
1990/91 prel.	86.9	71.4	15.5	0.0	0.8	1.4	0.0	0.1	12.0	20.7	9.1	0.0	7.5	0.1	1.3	3.1	1.9	0.2	3.0	10.1
1991/92 proj.																				
September	91.6	73.7	17.9	0.0	1.0	1.2	0.0	0.1	11.3	22.0	10.0	0.0	7.8	0.2	1.3	3.5	1.9	0.3	2.7	10.5
October	90.7	73.1	17.6	0.0	0.9	1.2	0.0	0.1	11.0	22.0	10.0	0.0	7.8	0.2	1.3	3.5	1.9	0.3	2.7	10.2

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains and pulses are 210.9 million tons in 1989/90, 235.0 million in 1990/91, and 185.0 million forecast in 1991/92.

2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also includes copra and palm kernels for all countries.

Note: Entries of 0.0 indicate no reported or insignificant production.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 3

Wheat Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. Sept	Oct	1989/90	Prel. 1990/91	1991/92 Proj. Sept	Oct
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	226.2	231.8	222.8	2.38	2.56	2.47	2.47	537.6	593.6	550.9	550.3
United States	25.2	28.0	23.3	2.20	2.66	2.33	2.31	55.4	74.5	54.8	53.9
Total Foreign	201.1	203.7	199.5	2.40	2.55	2.48	2.49	482.1	519.1	496.1	496.4
Maj. Foreign Exporters	45.1	45.8	44.2	2.91	3.13	3.20	3.24	131.0	143.3	141.5	143.3
Argentina	5.5	5.7	4.9	1.86	1.84	1.84	1.84	10.2	10.5	9.0	9.0
Australia	9.0	9.2	7.8	1.58	1.67	1.47	1.41	14.2	15.4	11.5	11.0
Canada	13.6	14.4	14.7	1.80	2.27	2.21	2.24	24.6	32.7	32.5	33.0
EC-12	17.0	16.5	16.8	4.83	5.14	5.25	5.39	82.0	84.7	88.5	90.3
Major Importers	96.4	98.1	95.1	2.48	2.67	2.46	2.46	238.8	261.4	235.2	233.6
Brazil	3.4	3.3	2.4	1.65	0.97	1.33	1.33	5.6	3.2	3.2	3.2
China	29.8	30.8	30.7	3.04	3.19	3.06	3.06	90.8	98.2	94.0	94.0
Eastern Europe	9.8	9.7	9.8	4.14	4.22	4.02	4.05	40.7	41.1	39.4	39.7
Egypt	0.6	0.7	0.8	5.05	5.79	6.40	6.40	3.2	4.3	4.8	4.8
Other N. Africa 1/	4.7	5.1	5.2	1.13	1.11	1.44	1.55	5.3	5.6	7.5	8.1
Japan	0.3	0.3	0.2	3.47	3.66	3.51	3.51	1.0	1.0	0.9	0.9
USSR	47.7	48.2	46.0	1.94	2.24	1.84	1.80	92.3	108.0	85.5	83.0
Other Foreign	59.7	59.9	60.2	1.88	1.91	1.99	1.98	112.3	114.4	119.4	119.4
India	24.1	23.5	24.3	2.24	2.12	2.22	2.22	54.1	49.7	54.0	54.0
Iran	6.8	6.5	6.2	0.81	1.08	1.15	1.15	5.5	7.0	7.1	7.1
Mexico	1.0	1.0	0.9	4.21	4.11	3.98	3.98	4.0	3.9	3.5	3.5
Non-EC W. Europe	0.8	0.9	0.8	5.18	5.41	5.16	5.19	4.4	5.1	4.0	4.1
Pakistan	7.7	7.8	8.0	1.87	1.82	1.82	1.82	14.4	14.3	14.5	14.5
South Africa	1.8	1.6	1.4	1.11	1.10	1.48	1.48	2.0	1.7	2.1	2.1
Turkey	8.7	8.8	8.9	1.44	1.71	1.80	1.80	12.5	15.0	16.0	16.0
Others	8.7	9.9	9.8	1.77	1.80	1.88	1.84	15.4	17.8	18.2	18.1

1/ Algeria, Libya, Morocco, and Tunisia.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Sept	Oct	1989/90	1990/91	Sept	Oct
TOTAL COARSE GRAINS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World 1/	323.1	318.0	320.5	2.48	2.62	2.48	2.50	802.6	833.8	795.1	800.3
United States	37.0	36.4	37.3	5.98	6.34	5.71	5.86	221.4	230.7	213.5	218.3
Total Foreign	286.1	281.7	283.2	2.03	2.14	2.06	2.06	581.3	603.1	581.6	582.1
Maj. Foreign Exporters	21.3	20.7	21.3	2.46	2.75	2.50	2.51	52.5	57.0	53.7	53.6
Argentina	3.2	3.3	3.6	2.64	3.43	2.86	2.86	8.3	11.2	10.2	10.2
Australia	4.0	4.2	4.8	1.73	1.65	1.53	1.53	6.8	6.9	7.3	7.3
Canada	8.3	7.9	7.4	2.84	3.30	3.09	3.15	23.5	26.1	23.6	23.5
South Africa	4.4	3.8	4.0	2.18	2.28	2.15	2.15	9.5	8.8	8.6	8.6
Thailand	1.6	1.5	1.5	2.78	2.65	2.65	2.65	4.3	4.1	4.0	4.0
Major Importers	103.8	99.8	101.1	2.73	2.84	2.67	2.67	282.9	283.2	267.9	269.5
Eastern Europe	16.5	15.9	16.1	3.66	3.28	3.63	3.80	60.2	52.2	58.8	61.1
EC-12	20.3	19.3	19.2	4.43	4.36	4.59	4.60	89.8	84.1	87.5	88.2
Other W. Europe	3.1	3.0	2.9	3.98	4.49	4.16	4.17	12.4	13.7	11.8	11.9
Mexico	7.5	8.2	8.4	1.88	2.23	1.98	1.94	14.1	18.4	16.8	16.3
USSR	56.0	52.9	54.2	1.87	2.14	1.71	1.67	104.8	113.3	91.5	90.5
Other Major Import. 2/	0.4	0.4	0.4	3.83	3.63	3.70	3.70	1.6	1.5	1.5	1.5
Other Foreign	161.0	161.1	160.8	1.53	1.63	1.62	1.61	245.9	263.0	260.0	259.0
Brazil	12.5	13.5	13.5	1.79	1.79	1.98	1.98	22.5	24.2	26.7	26.7
China	28.2	29.1	28.6	3.31	3.90	3.62	3.62	93.5	113.5	103.6	103.6
India	37.7	36.8	36.7	0.92	0.90	0.86	0.86	34.6	33.3	32.5	31.5
Indonesia	2.7	2.9	2.9	1.85	1.82	1.83	1.79	5.0	5.2	5.4	5.2
Nigeria	9.9	9.5	9.9	0.82	0.67	0.84	0.84	8.1	6.3	8.3	8.3
Philippines	3.6	3.8	3.9	1.24	1.24	1.24	1.24	4.5	4.7	4.9	4.9
Turkey	4.4	4.5	4.5	1.70	1.99	2.17	2.17	7.5	8.9	9.7	9.7
Others	61.8	61.1	60.8	1.14	1.10	1.15	1.14	70.2	67.0	69.0	69.1
BARLEY											
World	74.8	75.0	77.3	2.27	2.49	2.25	2.26	170.0	186.5	172.5	174.6
United States	3.4	3.0	3.4	2.62	3.02	2.99	2.97	8.8	9.2	10.2	10.1
Total Foreign	71.5	72.0	73.9	2.26	2.46	2.22	2.23	161.2	177.3	162.3	164.5
Australia	2.3	2.5	2.8	1.75	1.65	1.50	1.50	4.0	4.2	4.2	4.2
Canada	4.7	4.8	4.7	2.50	2.97	2.68	2.79	11.7	14.2	13.0	13.0
China	3.3	3.3	3.3	1.74	1.73	1.73	1.73	5.7	5.7	5.7	5.7
Eastern Europe	3.6	3.6	3.8	4.03	4.00	3.82	3.84	14.5	14.3	14.4	14.4
EC-12	12.6	12.3	12.1	4.05	4.13	4.15	4.19	51.0	50.8	49.7	50.8
Other W. Europe	1.5	1.5	1.5	3.87	4.36	3.90	3.91	5.9	6.4	5.9	5.9
Turkey	3.4	3.4	3.4	1.46	1.76	2.00	2.00	4.9	6.0	6.8	6.8
USSR	27.6	26.1	28.5	1.75	2.34	1.65	1.65	48.5	61.0	47.0	47.0
Others	12.5	14.5	13.9	1.20	1.01	1.20	1.20	15.0	14.7	15.6	16.6

FOOTNOTES AT END OF TABLE

October 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Sept	Oct	1989/90	1990/91	Sept	Oct
CORN	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	126.7	127.4	129.7	3.65	3.76	3.61	3.65	462.6	478.9	468.5	473.1
United States	26.2	27.1	27.8	7.30	7.44	6.66	6.83	191.2	201.5	185.3	190.0
Total Foreign	100.5	100.3	101.9	2.70	2.77	2.78	2.78	271.4	277.4	283.2	283.2
Maj. Foreign Exporters	6.7	6.4	6.8	2.72	3.09	2.79	2.79	18.2	19.8	18.9	18.9
Argentina	1.7	2.0	2.2	3.06	4.00	3.27	3.27	5.2	7.8	7.2	7.2
South Africa	3.6	3.1	3.3	2.47	2.65	2.46	2.46	8.9	8.2	8.0	8.0
Thailand	1.4	1.4	1.3	2.93	2.81	2.80	2.80	4.1	3.8	3.7	3.7
Major Importers	21.2	19.7	21.2	3.93	3.50	3.85	3.90	83.4	68.9	82.0	82.7
Eastern Europe	7.1	6.5	6.5	4.14	3.26	4.27	4.69	29.2	21.1	28.2	30.5
EC-12	3.9	3.4	3.9	6.91	6.27	6.95	6.72	26.9	21.6	26.8	26.2
Other W. Europe	0.2	0.2	0.2	7.83	7.98	7.88	7.93	1.8	1.8	1.7	1.8
Mexico	5.8	6.6	7.0	1.68	2.14	1.83	1.83	9.8	14.1	12.8	12.8
USSR	4.1	2.8	3.5	3.71	3.50	3.43	3.14	15.3	9.8	12.0	11.0
Other Maj. Import. 2/	0.1	0.1	0.1	4.28	4.10	4.18	4.18	0.5	0.5	0.5	0.5
Other Foreign	72.6	74.2	73.9	2.34	2.54	2.46	2.46	169.8	188.7	182.3	181.5
Brazil	12.1	13.0	13.0	1.80	1.81	2.00	2.00	21.8	23.5	26.0	26.0
Canada	1.0	1.0	1.1	6.36	6.91	6.06	6.06	6.4	7.2	6.6	6.6
China	20.4	21.4	21.0	3.88	4.52	4.19	4.19	78.9	96.8	88.0	88.0
Egypt	0.8	0.8	0.9	5.37	5.43	5.59	5.59	4.5	4.6	4.8	4.8
India	5.9	6.1	5.7	1.61	1.54	1.49	1.47	9.4	9.4	8.5	8.4
Indonesia	2.7	2.9	2.9	1.85	1.82	1.83	1.79	5.0	5.2	5.4	5.2
Philippines	3.6	3.8	3.9	1.24	1.24	1.24	1.24	4.5	4.7	4.9	4.9
Zimbabwe	1.2	1.1	1.2	1.72	1.45	1.67	1.67	2.0	1.6	2.0	2.0
Others	24.9	24.1	24.3	1.50	1.48	1.49	1.47	37.3	35.7	36.2	35.7
SORGHUM											
World	41.6	39.2	39.8	1.32	1.35	1.33	1.31	55.0	53.0	53.0	52.3
United States	4.5	3.7	3.9	3.48	3.95	3.53	3.65	15.6	14.5	13.9	14.4
Total Foreign	37.2	35.5	35.8	1.06	1.08	1.09	1.06	39.4	38.5	39.1	37.9
Argentina	0.7	0.7	0.7	2.86	3.57	2.86	2.86	2.0	2.5	2.0	2.0
Australia	0.4	0.5	0.6	2.27	1.95	1.92	1.92	0.9	0.9	1.1	1.1
China	1.6	1.5	1.5	2.72	3.71	3.47	3.47	4.4	5.7	5.2	5.2
India	14.9	14.8	15.0	0.86	0.82	0.83	0.80	12.9	12.1	12.5	12.0
Mexico	1.3	1.3	1.1	2.88	2.85	2.92	2.73	3.8	3.7	3.5	3.0
Nigeria	4.4	4.4	4.4	0.80	0.64	0.80	0.80	3.5	2.8	3.5	3.5
South Africa	0.2	0.2	0.2	1.11	1.12	1.11	1.11	0.3	0.2	0.3	0.3
Sudan	4.0	3.0	3.0	0.45	0.50	0.50	0.50	1.8	1.5	1.5	1.5
Thailand	0.2	0.2	0.2	1.44	1.39	1.47	1.47	0.2	0.3	0.3	0.3
Others	9.4	9.0	9.2	1.02	0.98	1.01	0.99	9.6	8.8	9.3	9.1

FOOTNOTES AT END OF TABLE

October 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Sept	Oct	1989/90	1990/91	Sept	Oct
OATS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	22.6	21.3	20.5	1.83	1.98	1.75	1.71	41.4	42.3	35.7	35.1
United States	2.8	2.4	1.9	1.95	2.16	1.87	1.81	5.4	5.2	3.8	3.5
Total Foreign	19.8	18.9	18.6	1.82	1.96	1.74	1.70	36.0	37.1	31.9	31.6
USSR	10.8	10.7	10.7	1.57	1.68	1.43	1.36	16.8	18.0	15.0	14.5
Maj. Foreign Exporters	3.7	3.0	3.0	1.97	2.17	2.03	2.00	7.3	6.4	6.1	6.0
Argentina	0.4	0.3	0.4	1.44	1.34	1.29	1.29	0.6	0.4	0.5	0.5
Australia	1.1	1.1	1.3	1.44	1.48	1.38	1.38	1.6	1.6	1.8	1.8
Canada	1.7	1.2	1.0	2.08	2.34	2.42	2.32	3.5	2.9	2.4	2.3
Sweden	0.4	0.4	0.3	3.54	4.42	4.09	4.09	1.5	1.6	1.4	1.4
Other Foreign	5.4	5.3	4.9	2.21	2.40	2.22	2.27	11.9	12.6	10.9	11.1
China	0.6	0.6	0.6	1.20	1.21	1.18	1.18	0.7	0.7	0.7	0.7
Eastern Europe	1.2	1.2	1.2	2.55	2.70	2.54	2.55	3.2	3.3	3.0	3.0
Czechoslovakia	0.1	0.1	0.1	3.24	4.55	4.00	4.00	0.3	0.4	0.4	0.4
Poland	0.8	0.7	0.7	2.72	2.84	2.67	2.67	2.2	2.1	1.9	1.9
EC-12	1.8	1.6	1.4	2.74	3.07	2.89	3.07	4.8	5.1	4.2	4.4
France	0.3	0.2	0.2	3.73	3.86	3.81	3.81	1.0	0.9	0.8	0.8
Germany	0.6	0.6	0.4	3.58	3.93	4.44	4.92	2.0	2.4	1.7	1.9
Finland	0.4	0.5	0.3	3.24	3.67	3.23	3.23	1.4	1.7	1.1	1.1
Norway	0.1	0.1	0.1	3.13	4.58	4.00	4.00	0.4	0.6	0.5	0.5
Others	1.3	1.3	1.2	1.12	1.09	1.11	1.12	1.4	1.4	1.4	1.4
RYE											
World	16.9	16.6	14.0	2.22	2.33	2.21	2.16	37.6	38.7	29.7	30.2
United States	0.2	0.2	0.2	1.77	1.70	1.73	1.55	0.3	0.3	0.3	0.2
Total Foreign	16.7	16.5	13.8	2.23	2.34	2.21	2.17	37.2	38.5	29.4	29.9
USSR	10.7	10.4	8.5	1.87	2.02	1.75	1.71	20.1	21.0	14.0	14.5
Maj. Foreign Exporter											
Canada	0.5	0.4	0.2	1.74	1.68	1.78	1.78	0.9	0.7	0.4	0.4
Other Foreign											
Eastern Europe	3.3	3.4	3.4	2.94	2.88	2.82	2.82	9.7	9.9	9.5	9.5
Hungary	0.1	0.1	0.1	2.06	2.46	2.40	2.40	0.2	0.2	0.2	0.2
Poland	2.9	3.1	3.0	2.95	2.86	2.82	2.82	8.6	8.8	8.5	8.5
Czechoslovakia	0.2	0.2	0.2	4.05	4.26	3.82	3.82	0.7	0.7	0.7	0.7
EC-12	1.6	1.6	1.2	3.32	3.40	3.66	3.65	5.2	5.4	4.5	4.5
Denmark	0.1	0.1	0.1	4.82	4.95	4.84	4.57	0.5	0.5	0.5	0.4
Germany	1.0	1.0	0.7	3.86	3.87	4.64	4.66	3.9	4.0	3.3	3.3
Others	0.6	0.6	0.5	2.29	2.38	2.20	2.21	1.3	1.5	1.0	1.0

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.
2/ Japan, Republic of Korea, and Taiwan.

October 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 5

Rice Area, Yield, and Production
World and Selected Countries and Regions

	AREA			YIELD				PRODUCTION (Rough Basis)				MILLING RATE				PRODUCTION (Milled Basis)			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.			Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Sept	Oct	1989/90	1990/91	Sept	Oct	1989/90	1990/91	Sept	Oct	1989/90	1990/91	Sept	Oct
	—Million Hectares—			—Metric Tons Per Hectare—				—Million Metric Tons—				—In Percent—				—Million Metric Tons—			
World	146.4	147.1	145.8	3.5	3.5	3.5	3.5	508.7	519.9	510.5	507.6	67.7	67.8	67.7	67.7	344.6	352.3	345.8	343.9
United States	1.1	1.1	1.1	6.4	6.2	6.2	6.2	7.0	7.0	7.1	7.2	72.6	72.0	70.0	70.0	5.1	5.1	5.0	5.0
Total Foreign	145.4	146.0	144.7	3.5	3.5	3.5	3.5	501.7	512.9	503.3	500.5	67.7	67.7	67.7	67.5	339.5	347.3	340.8	338.9
Maj. Foreign Exporters	16.8	16.6	16.6	2.3	2.2	2.3	2.3	38.5	35.9	37.6	37.6	64.0	63.8	64.1	64.1	24.6	22.9	24.1	24.1
Burma	4.7	4.8	4.5	2.9	2.9	2.8	2.8	13.5	13.7	12.6	12.6	60.0	60.0	60.0	60.0	8.1	8.2	7.6	7.6
Pakistan	2.1	2.1	2.1	2.3	2.3	2.3	2.3	4.8	4.9	5.0	5.0	66.7	66.7	66.7	66.7	3.2	3.3	3.3	3.3
Thailand	10.0	9.7	10.0	2.0	1.8	2.0	2.0	20.2	17.3	20.0	20.0	66.0	66.0	66.0	66.0	13.3	11.4	13.2	13.2
Major Importers	13.9	13.9	13.6	4.2	4.2	4.2	4.2	58.6	58.4	57.6	57.7	66.1	66.0	66.1	66.1	38.7	38.6	38.1	38.1
EC-12	0.3	0.4	0.4	6.2	6.4	6.0	6.1	2.1	2.4	2.3	2.3	67.0	67.4	67.4	67.3	1.4	1.6	1.5	1.5
Indonesia	10.5	10.5	10.2	4.2	4.3	4.4	4.4	44.7	45.2	44.4	44.4	65.0	65.0	65.0	65.0	29.1	29.4	28.9	28.9
Nigeria	0.6	0.7	0.7	1.4	1.4	1.4	1.4	0.9	0.9	0.9	0.9	60.0	60.0	60.0	60.0	0.5	0.6	0.6	0.6
Republic of Korea	1.3	1.2	1.2	6.4	6.2	6.4	6.4	8.1	7.7	7.8	7.8	72.8	72.6	72.7	72.7	5.9	5.6	5.7	5.7
Other Maj. Import. 1/	1.2	1.1	1.1	2.4	1.9	2.0	2.0	2.8	2.2	2.2	2.2	65.5	65.4	65.8	65.8	1.8	1.4	1.5	1.5
Other Foreign	114.6	115.5	114.5	3.5	3.6	3.5	3.5	404.6	418.6	408.2	405.3	68.3	68.3	68.3	68.3	276.1	285.8	278.6	276.7
Australia	0.1	0.1	0.1	8.0	8.8	8.3	8.3	0.9	0.8	1.1	1.1	71.5	71.5	71.5	71.5	0.7	0.6	0.8	0.8
Bangladesh	10.5	10.4	10.5	2.6	2.6	2.6	2.6	26.8	26.9	27.6	27.6	66.7	66.7	66.7	66.7	17.9	17.9	18.4	18.4
Brazil	4.3	4.5	5.3	1.7	2.1	1.9	1.9	7.2	9.3	10.0	10.0	68.0	68.0	68.0	68.0	4.9	6.3	6.8	6.8
China	32.7	33.1	32.6	5.5	5.7	5.6	5.6	180.1	189.3	182.0	182.0	70.0	70.0	70.0	70.0	126.1	132.5	127.4	127.4
India	42.2	42.6	41.1	2.6	2.6	2.6	2.6	111.1	111.9	109.5	107.3	66.7	66.7	66.7	66.7	74.1	74.6	73.0	71.5
Japan	2.1	2.1	2.1	6.2	6.3	6.2	6.2	12.9	13.1	12.9	12.9	72.8	72.8	72.8	72.8	9.4	9.6	9.4	9.4
Philippines	3.4	3.4	3.3	2.6	2.9	2.6	2.8	8.9	9.9	9.5	9.3	65.0	65.0	65.0	65.0	5.8	6.4	6.2	6.0
USSR	0.7	0.6	0.6	3.9	4.0	4.0	3.7	2.6	2.4	2.6	2.2	65.0	65.0	65.0	65.0	1.7	1.6	1.7	1.4
Vietnam	5.7	5.7	5.9	3.3	3.3	3.0	3.0	19.0	19.0	18.0	18.0	66.0	66.0	66.0	66.0	12.5	12.5	11.9	11.9
Others	12.9	13.0	12.9	2.7	2.8	2.7	2.7	35.0	36.0	34.9	34.9	66.1	66.2	66.2	66.2	23.2	23.8	23.1	23.1

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

October 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Sept	Oct	1989/90	1990/91	Sept	Oct
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SOYBEANS											
World	58.26	54.08	55.67	1.84	1.91	1.84	1.89	107.27	103.10	101.99	105.36
United States	24.09	22.87	23.73	2.17	2.29	2.08	2.22	52.35	52.42	49.45	52.62
Total Foreign	34.16	31.22	31.95	1.61	1.62	1.66	1.65	54.92	50.69	52.54	52.73
Maj. Foreign Exporters	16.35	14.40	15.00	1.90	1.83	1.88	1.88	31.09	26.30	28.25	28.25
Argentina	4.95	4.75	5.00	2.17	2.27	2.15	2.15	10.75	10.80	10.75	10.75
Brazil	11.40	9.65	10.00	1.78	1.61	1.75	1.75	20.34	15.50	17.50	17.50
Other Foreign	17.81	16.82	16.95	1.34	1.45	1.45	1.44	23.83	24.39	24.29	24.48
Canada	0.54	0.49	0.58	2.26	2.64	2.14	2.14	1.22	1.29	1.23	1.23
China	8.06	7.56	7.50	1.27	1.46	1.44	1.44	10.23	11.00	10.80	10.80
Eastern Europe	0.70	0.36	0.28	0.97	1.07	1.30	1.30	0.68	0.39	0.36	0.36
EC-12	0.63	0.69	0.58	3.13	3.12	3.14	3.14	1.98	2.17	1.81	1.81
India	2.13	2.39	2.65	0.80	1.02	1.00	1.02	1.72	2.44	2.40	2.70
Indonesia	1.21	1.22	1.24	1.09	1.08	1.11	1.04	1.32	1.32	1.40	1.29
Paraguay	0.98	0.89	0.90	1.61	1.46	1.78	1.78	1.58	1.30	1.60	1.60
USSR	0.83	0.83	0.81	1.15	1.06	1.14	1.14	0.96	0.88	0.92	0.92
Others	2.74	2.39	2.42	1.52	1.51	1.56	1.56	4.17	3.61	3.78	3.78
COTTONSEED											
World	32.25	33.27	34.37	0.96	1.01	1.00	1.01	30.92	33.55	34.97	34.69
United States	3.86	4.75	5.44	1.10	1.14	1.15	1.14	4.24	5.41	6.26	6.18
Total Foreign	28.39	28.52	28.93	0.94	0.99	0.97	0.99	26.68	28.14	28.71	28.51
China	5.20	5.59	6.00	1.24	1.37	1.36	1.36	6.44	7.66	8.16	8.16
India	7.53	7.36	7.27	0.58	0.53	0.54	0.59	4.40	3.90	4.20	4.30
Pakistan	2.60	2.69	2.78	1.12	1.21	1.23	1.23	2.91	3.27	3.40	3.40
USSR	3.33	3.15	3.01	1.53	1.56	1.53	1.46	5.11	4.92	4.60	4.40
Others	9.73	9.73	9.88	0.80	0.86	0.84	0.83	7.82	8.38	8.35	8.25
PEANUTS											
World	19.82	20.02	20.32	1.11	1.14	1.15	1.15	22.06	22.89	22.86	23.42
United States	0.67	0.73	0.80	2.72	2.23	2.87	2.82	1.81	1.63	2.28	2.24
Total Foreign	19.16	19.29	19.53	1.06	1.10	1.08	1.08	20.25	21.26	20.58	21.18
Argentina	0.18	0.20	0.19	1.87	2.37	2.11	2.11	0.34	0.48	0.40	0.40
China	2.96	2.91	3.02	1.81	2.19	1.99	1.99	5.37	6.37	6.00	6.00
India	8.71	8.65	8.70	0.93	0.93	0.92	0.94	8.09	8.08	7.60	8.20
Senegal	0.78	0.92	0.90	1.04	0.73	0.77	0.77	0.82	0.67	0.70	0.70
South Africa	0.09	0.09	0.09	1.28	1.59	1.50	1.50	0.11	0.14	0.14	0.14
Sudan	0.55	0.54	0.53	0.73	0.60	0.75	0.75	0.40	0.33	0.40	0.40
Others	5.89	5.99	6.10	0.87	0.87	0.88	0.88	5.13	5.21	5.35	5.35

October 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Sept	Oct	1989/90	1990/91	Sept	Oct
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SUNFLOWERSEED											
World	15.88	16.27	16.41	1.38	1.37	1.33	1.31	21.87	22.27	21.23	21.43
United States	0.72	0.75	1.02	1.10	1.38	1.50	1.46	0.80	1.03	1.54	1.50
Total Foreign	15.16	15.52	15.38	1.39	1.37	1.32	1.30	21.07	21.23	19.69	19.93
Argentina	2.80	2.30	2.50	1.36	1.70	1.40	1.40	3.80	3.90	3.50	3.50
China	0.72	0.70	0.71	1.49	1.71	1.62	1.62	1.06	1.20	1.15	1.15
EC-12	2.13	2.55	2.39	1.67	1.61	1.71	1.71	3.54	4.09	4.10	4.10
East Europe	1.27	1.23	1.17	1.81	1.70	1.77	1.77	2.29	2.09	2.08	2.08
USSR	4.46	4.67	4.60	1.59	1.41	1.30	1.30	7.07	6.56	6.00	6.00
Others	3.80	4.08	4.01	0.87	0.83	0.80	0.78	3.32	3.40	2.87	3.11
RAPESEED											
World	17.12	18.24	19.89	1.28	1.39	1.37	1.37	21.85	25.37	27.22	27.23
United States 1/	0.03	0.03	0.06	1.58	1.74	1.75	1.75	0.05	0.05	0.11	0.11
Total Foreign	17.09	18.21	19.83	1.28	1.39	1.36	1.37	21.80	25.32	27.11	27.12
Canada	2.90	2.58	3.27	1.07	1.27	1.28	1.28	3.10	3.28	4.20	4.20
China	4.99	5.50	6.10	1.09	1.26	1.16	1.16	5.44	6.96	7.10	7.10
EC-12	1.81	2.13	2.43	2.96	2.89	3.00	3.00	5.34	6.14	7.28	7.29
East Europe	0.81	0.74	0.69	2.66	2.38	2.41	2.41	2.15	1.75	1.66	1.66
India	4.99	5.72	5.70	0.83	0.94	0.88	0.88	4.12	5.40	5.00	5.00
Others	1.59	1.54	1.65	1.04	1.16	1.10	1.14	1.65	1.78	1.88	1.88
FLAXSEED											
World	3.74	3.76	3.38	0.50	0.61	0.59	0.60	1.85	2.30	2.09	2.02
United States	0.07	0.10	0.12	0.47	0.95	0.97	0.97	0.03	0.10	0.11	0.11
Total Foreign	3.67	3.66	3.26	0.50	0.60	0.58	0.58	1.82	2.20	1.97	1.90
Argentina	0.58	0.58	0.42	0.90	0.83	0.84	0.86	0.52	0.48	0.38	0.36
Canada	0.60	0.73	0.54	0.83	1.29	1.30	1.30	0.50	0.94	0.70	0.70
India	1.18	1.17	1.10	0.29	0.31	0.33	0.32	0.34	0.36	0.40	0.35
USSR	0.97	0.85	0.85	0.24	0.19	0.21	0.21	0.23	0.16	0.18	0.18
Others	0.36	0.34	0.35	0.67	0.77	0.89	0.89	0.24	0.26	0.31	0.31
MAJOR OILSEEDS	147.08	145.64	150.04	1.40	1.44	1.41	1.43	205.83	209.48	210.36	214.14
United States	29.44	29.23	31.16	2.01	2.07	1.92	2.01	59.29	60.65	59.75	62.76
Total Foreign	117.63	116.41	118.88	1.25	1.28	1.27	1.27	146.54	148.83	150.61	151.38
COPRA	--	--	--	--	--	--	--	4.90	4.74	4.71	4.69
PALM KERNEL	--	--	--	--	--	--	--	3.33	3.31	3.59	3.59
TOTAL OILSEEDS	--	--	--	--	--	--	--	*214.07*	*217.52*	*218.66*	*222.41*
PALM OIL 2/	--	--	--	--	--	--	--	10.91	11.04	11.91	11.91

1/ U.S. rapeseed estimates by the WAOB and Interagency Oilseeds Committee. 2/ Not included in total oilseeds.

October 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 7

Cotton Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Sept	Oct	1989/90	1990/91	Sept	Oct
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	31.6	33.1	34.2	552	572	573	578	80.0	86.9	91.6	90.7
United States	3.9	4.7	5.4	688	711	715	706	12.2	15.5	17.9	17.6
Total Foreign	27.7	28.3	28.7	533	549	547	554	67.8	71.4	73.7	73.1
Maj. Foreign Exporters	13.1	13.2	13.6	727	790	780	775	43.7	48.0	48.7	48.3
Australia	0.2	0.3	0.3	1,326	1,563	1,379	1,379	1.4	1.9	1.9	1.9
Central America 1/	0.1	0.1	0.1	832	810	793	742	0.3	0.3	0.3	0.3
China	5.2	5.6	6.0	728	807	798	798	17.4	20.7	22.0	22.0
Egypt	0.4	0.4	0.4	683	719	755	811	1.3	1.4	1.3	1.3
Mexico	0.2	0.2	0.3	891	914	837	754	0.8	0.8	1.0	0.9
Pakistan	2.6	2.7	2.8	560	607	612	612	6.7	7.5	7.8	7.8
Sudan	0.3	0.2	0.2	456	422	498	498	0.6	0.4	0.4	0.4
Turkey	0.7	0.6	0.6	851	1,021	956	956	2.8	3.0	2.7	2.7
USSR	3.3	3.2	3.0	805	827	817	796	12.3	12.0	11.3	11.0
Major Importers 2/	0.4	0.4	0.3	887	801	833	833	1.5	1.5	1.3	1.3
Other Foreign	14.3	14.7	14.8	346	325	334	345	22.6	21.9	23.6	23.5
Argentina	0.6	0.6	0.6	486	444	465	465	1.3	1.3	1.3	1.3
Brazil	1.9	2.0	2.0	347	340	381	381	3.0	3.1	3.5	3.5
India	7.3	7.4	7.3	315	270	279	298	10.6	9.1	10.0	10.0
Syria	0.2	0.2	0.2	930	963	934	934	0.7	0.7	0.7	0.7
Others	4.3	4.6	4.8	357	369	368	368	7.0	7.7	8.2	8.0

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

October 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 8

The table below presents a 10-year record of the difference between the October projections and the final estimates. Using world wheat production as an example, changes between the October projection and the final estimate have averaged 9.0 million tons (1.8 percent) and ranged from -26.7 to 5.8 million tons. The October projection has been below the final 6 times and above the final 4 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 - 1990/91 1/					
	Difference		Lowest	Highest	Below	Above
	Average	Average	Difference		Final	Final
	Percent	---Million Metric Tons---			Number of Years 2/	
WHEAT						
World	1.8	9.0	-26.7	5.8	6	4
U.S.	0.5	0.3	-1.2	0.1	6	4
Foreign	2.1	9.0	-26.8	6.0	6	4
COARSE GRAINS 3/						
World	1.3	10.3	-23.8	9.1	7	3
U.S.	1.9	3.8	-10.6	2.8	7	3
Foreign	1.4	8.3	-18.5	7.5	7	3
RICE (Milled)						
World	2.8	8.8	-20.9	3.0	8	1
U.S.	2.8	0.1	-0.2	0.2	7	3
Foreign	2.8	8.7	-21.0	3.1	8	2
SOYBEANS						
World	2.4	2.2	-4.7	4.5	3	7
U.S.	3.6	1.8	-3.2	3.1	3	7
Foreign	4.5	1.9	-3.0	4.0	4	6
		---Million 480-lb. Bales---				
COTTON						
World	2.8	2.2	-10.1	3.9	5	4
U.S.	3.8	0.5	-1.4	0.3	7	3
Foreign	3.1	2.1	-10.4	3.6	4	6
UNITED STATES		-------Million Bushels-------				
CORN	5.5	316	-599	1,071	6	4
SORGHUM	6.1	44	-82	83	7	3
BARLEY	3.2	16	-16	46	5	5
OATS	4.7	19	-26	57	4	6

1/ The final estimate for 1981/82-1989/90 is defined as the first November estimate following the marketing year and for 1990/91 last month's estimate.
2/ May not total ten if projection was the same as the final.
3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

October 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

OCTOBER 10, 1991

1 - CANADA

Harvests are virtually complete across the Prairies. Showers in the eastern Prairies improve soil moisture for fall seeded grains.

2 - UNITED STATES

Harvest progresses rapidly in the eastern Corn Belt. Record early freeze damages immature corn and soybeans in northern Iowa and southern Minnesota. Cool spells slow cotton development from Texas to the Carolinas. Winter wheat planting progresses.

3 - SOUTH AMERICA

In Argentina, freezing temperatures stress winter wheat in early October. Subsoil moisture is adequate while topsoils are becoming dry. Widespread showers cover previously dry areas of southern Brazil aiding coffee flowering, corn development, and soil moisture for soybean planting.

4 - EUROPE

Widespread rain in recent weeks slows summer crop harvesting but moistens topsoils for winter crop emergence. Locally heavy rain falls in the Alpine region.

5 - WESTERN USSR

Below-normal rainfall in September over most of the south favors summer crop harvesting and winter grain planting. Warm, wet weather benefits wheat establishment in the north.

6 - NEW LANDS

Dry weather in early October favors rapid spring grain harvesting, slowed by occasional rain in September.

7 - SOUTH ASIA

Early September rain boosts reservoirs for winter wheat planting. The monsoon's withdrawal from northwestern and central regions benefits maturing summer crops but stresses late planted oilseeds. Recent showers help fall planted crops in the south and east.

8 - EASTERN ASIA

Summer crop harvesting progresses in Manchuria and the North China Plain. Dry weather aids late maturing rice across southern China, but the southwest is becoming too dry. Tropical storms flood Japan and Taiwan.

9 - SOUTHEAST ASIA

Showers in Indochina favor autumn-planted rice but flooding occurs along the Mekong. Drought deteriorates planting prospects in Java's rice areas.

10 - AUSTRALIA

Winter wheat conditions deteriorate further in Queensland and northern New South Wales as dryness continues. Western wheat areas are becoming dry.

(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 447-7917.)

WEATHER BRIEFS

SOUTHERN BRAZIL: RAIN IMPROVES CROP CONDITIONS

Widespread timely rain greatly improved crop conditions across southern Brazil during September 15 - October 10, 1991. As reported in last month's "Weather Briefs", dry conditions during August and early September, 1991 adversely affected winter grains and delayed early corn planting. The increased September - October rainfall improved soil moisture levels for planting and germination of summer crops, and provided moisture for coffee and citrus, which were entering their flowering and fruit setting stages as of September 15, 1991. Periodic rain left most the region of southern Brazil well watered for the short term. Light-to-moderate rain (10-50mm) fell during September 15 - 21, 1991 across Sao Paulo, Minas Gerais, and Rio Grande do Sul, but missed drought stressed northern and central Parana. The next week, precipitation (13-68mm) did reach Parana, as well as Minas Gerais, Espirito Santo, and Sao Paulo. During September 29 - October 5, 1991 moderate-to-heavy rains (20-111mm) fell across the entire region except for Rio Grande do Sul and western Santa Catarina, where rainfall was lighter. Temperatures were mostly normal-to-slightly above normal across southern Brazil during this period.

AUSTRALIA: DROUGHT CONTINUES IN EAST

Drought conditions continued during the period of September 12 - October 10, 1991 across southern Queensland and northern New South Wales. This dryness adversely affected winter grain production and is now threatening summer crop planting, which normally begins in mid-October. Light rain (3-15mm) fell across this area during the week of September 8 - 14, 1991 and trace amounts (1-3mm) fell on October 8, 1991; the only measurable rain for this region since July 22, 1991. Temperatures were normal until the first week of October, when temperatures warmed to 3-4 degrees above normal, further stressing winter grains and depleting the already limited soil moisture. The front that brought light rain on October 8, also brought milder temperatures.

INDONESIA: DROUGHT INTENSIFIES

Drought conditions not only continued, but showed signs of increasing in area affected across southern Indonesia during the period of September 12 - October 10, 1991. Java and southern Borneo remained dry during this period. Also, during September 22 - October 10 rainfall amounts tended to decrease across southern Sumatra and the southern Malaysian Peninsula. Normally, by mid-September, seasonal rainfall increases across southern Indonesia. Dry conditions have already delayed field work in Java's rice growing areas. Increased rainfall is urgently needed across southern Indonesia to replenish moisture reserves following this season's failure of secondary rains to develop. Rice planting is usually in full swing by November.

PRODUCTION BRIEFS

ARGENTINA: FROST IN APPLE GROWING REGION

The Argentine apple-growing region of Rio Negro is reported to have suffered a light frost on October 2, 1991. The nearest weather station to the region believed to be affected reported a minimum temperature of 2 degrees centigrade, but with local variability it is possible that pockets of killing temperatures occurred. The extent of the effects on flowering trees is not known, but early reports indicate damage was limited. As the pear crop is already set, it should be unaffected by the frost.

SWITZERLAND: POLICY RESTRICTIONS FAIL TO CURB BREAD WHEAT OUTPUT

In 1990/91, the Swiss Government established planting targets for both bread and feed grains in an effort to curb bread wheat production. In addition, feed grain production was encouraged by increasing planting premiums. Feed grain area increased slightly, but not at the expense of wheat, as anticipated by the government. Although wheat area in 1991/92 declined slightly from last year's level, favorable weather increased estimated production to a near record 595,000 tons, up 9 percent from last year. The government will pay the guaranteed producer price but, as in 1990/91, it will impose a co-responsibility levy on producers for exceeding the 450,000 ton limit for bread grain, which is the estimated annual need for the Swiss milling industry. The levy is imposed to help pay the costs of denaturing wheat (the process of intentionally adulterating it so that it can be used only for feed). This season's levy was set at 10 Swiss francs per kilogram, the same as last year.

New government proposals for the 1992/93 season, if enacted, would impose restrictions on the production of grains with payments to farmers to encourage acreage set-aside; set limits on fungicide and insecticide applications; apportion payments to farmers on the basis of area of the farm unit in lieu of price support; and limit price support measures by the government. Under the proposal, producers would be required to take more financial responsibility for surplus production such as covering more of the losses incurred in denaturing bread wheat.

FRANCE: RECORD GRAIN HARVEST EXPECTED

France is expected to harvest a record grain crop this year due to excellent weather and record yields for wheat and barley. Total grain production is estimated at 60.2 million tons, up from the previous record of 58.5 million tons in 1984/85. Grain area has been relatively stable the past 5 years, ranging between 9.1 and 9.3 million hectares. Wheat output is pegged at 35.1 million tons, up from last year's record of 33.7 million tons. Yields are estimated at 6.69 tons per hectare versus the previous record of 6.52 tons per hectare in 1984/85. For barley, output is expected to be 10.6 million tons with a record 6.06 tons per hectare yield. Corn production is estimated at 12.4 million tons, up substantially from last year's drought reduced crop.

ARGENTINA: FLAXSEED PLANTINGS DOWN SHARPLY

Area planted to flax is down significantly this year as a result of wet soils and poor profit expectations at planting time. The flaxseed crop for 1991/92 is estimated at 360,000 tons, down 25 percent from last year and the lowest since 1975. Wet weather frustrated planting intentions this spring (September/October), with planted area in the main growing regions down from last year by 36 percent in Entre Rios and 12 percent in Buenos Aires. Many producers had already planned to reduce flax area this year due to low local flaxseed prices which averaged US$160 per ton last year compared to US$240 in 1989.

HONG KONG: NEW VEGETABLE VARIETIES GROWN

In recent years, Hong Kong vegetable farmers have been faced with increasing competition from China, where both land and labor costs are much lower. The Hong Kong Agriculture and Fisheries Department has taken an active role in encouraging farmers to shift from traditional Chinese vegetables to new varieties favored by hotels, restaurants, and upper-income families. Farmers are now growing crops such as baby carrots, red leaf lettuce, red cabbage, radishes, bean sprouts, and French beans on a commercial scale with seeds imported from the United States and Japan. They are also growing hydroponic vegetables without pesticides to meet growing consumer demand.

JAPAN: APPLE CROP DAMAGED BY TYPHOON

Japan's fruit and vegetable crops were badly damaged by Typhoon Mireille, which hit the northern part of the country on September 27 and 28 with moderate rain but very strong winds. Tree fruits, especially apples, suffered more damage than root crops such as onions and potatoes. According to a survey by the Ministry of Agriculture, Forestry and Fisheries, the apple crop in Aomori Prefecture, where nearly 50 percent of the nation's apples are grown, suffered from probably the worst typhoon damage in history. Before the storm, Aomori had expected to harvest 492,000 tons of apples, but roughly 60 percent of the fruit was reportedly blown from the trees. Many of the windfall apples are being salvaged by processors. The extent of damage to the apple crop in Nagano Prefecture, the second largest producing area, is unknown. Wholesale prices for apples on the Tokyo market have increased by 20 to 30 percent above pre-typhoon levels.

CHINA: STATE WHEAT PRICE TO INCREASE IN 1992

The People's Daily newspaper reported that China will significantly increase the State purchase price for wheat in 1992 to encourage farmers to raise output. The announcement was made just as farmers in northern China were beginning to plant their winter wheat crop. Chinese farmers are required to sell a portion of their wheat crops to the State at a set purchase price, which is usually much lower than the free market price. The state wheat price is to rise from 25.5 yuan (US$4.80) per 50 KG to 31.5 yuan (US$5.93), an increase of about 24 percent. This increase is expected to narrow the difference between the State and free market prices of wheat.

CHINA: BUMPER 1991/92 GRAIN HARVEST PREDICTED

The Ministry of Agriculture is predicting a bumper grain harvest in 1991, despite serious weather problems earlier in the season. Based on a nationwide survey, the Ministry is expecting a total grain (including soybeans and root/tuber crops) harvest of about 425 million tons, down 20 million from last year's record harvest but still the second largest crop in history. As announced earlier, summer grain production was down 1.9 million tons from last year, while the early rice crop was down 5 million tons from a year ago. Autumn grain production is expected to be down about 10 million tons from last year due to floods in the southeast and northeast provinces, drought in the southern coastal provinces and the northwest, and the double disasters of flood and drought in central and southwestern China. However, the weather over most of the country was nearly ideal in August and September for autumn grain maturing and harvest.

INDIA: GOVERNMENT ESTIMATES PUT OILSEEDS HIGHER

The Indian Government released new estimates this month for oilseed production, sharply increasing both the 1990/91 crop and projected 1991/92 harvest. The USDA 1991/92 estimates for peanuts, sunflowerseed, soybeans, and cottonseed were increased this month, based on the official Indian statistics for 1990/91 and analysis of this year's crop conditions. The big surprise was the 1990/91 peanut adjustment from what was regarded as an off-year, to only marginally below the excellent 1989/90 peanut crop. The explanation lies in the winter (rabi) crop. The dry weather in the summer of 1990 reduced the rain-fed summer peanut crop in Gujarat, but the irrigated winter (rabi) crop, mainly in Andhra Pradesh, increased in response to higher local prices resulting in upward revisions for both area and yield. According to data supplied by the U.S. agricultural counselor in New Delhi, rabi peanut area has more than doubled over the past 4 years. Rabi yields, much higher than for the summer crop, trended upwards as well, reflecting more productive land shifting from less profitable alternatives.

FEATURE COMMODITY ARTICLES

SOUTHEAST ASIA GRAIN SITUATION

Total grain production in Southeast Asia for 1991/92 is estimated at 86.2 million tons from an area of 46.3 million hectares. Production is down less than 1 percent from an estimated crop of 86.9 million tons produced during 1990/91 and down 2 percent from the record 87.7 million produced in 1989/90. Area has trended upward over the past decade from a low of 42.6 million hectares in 1982/83 to last year's record 46.5 million.

Southeast Asia, for the purposes of this article, is comprised of Burma, Cambodia, Indonesia, Laos, Malaysia, Philippines, Thailand, and Vietnam. The region produces an estimated 1991/92 rice crop (milled-basis) of 70.8 million tons, which is about 21 percent of the world's output. This is down slightly from last year and down 2 percent from the record 72.5 million tons produced in 1989/90. Rice area has trended upward during the past decade to level off at slightly above 37.0 million hectares.

Southeast Asia produces less than 1 percent of the world's corn, with 1991/92 production estimated at 14.9 million tons. The crop is up slightly from last year, but down marginally from the record produced in 1988/89. Corn area has fluctuated within a range of 7.7 to 9.1 million hectares throughout the past decade and is estimated at 8.8 million for 1991/92.

Wheat, sorghum, and millet are also grown in the region but are not produced in large quantities and total only 0.1 million, 0.2 million, and 0.1 million tons, respectively.

BURMA

Burma's 1991/92 total grain production is estimated at 8.0 million tons, down 0.6 million or 8 percent from last year's record 8.7 million ton crop. Harvested area is estimated at 4.9 million hectares, down 5 percent from 1990/91. After 3 years of expanding output, production is expected to decline this season. Rice is Burma's main grain crop, comprising roughly 90 percent of total grain production, with corn, wheat, and millet combining for the remaining 10 percent.

Rice output on a milled basis is estimated at 7.6 million tons, down 8 percent from a record 8.2 million produced last year. Harvested area is estimated at 4.5 million hectares, down 6 percent from last year's record. About 85 percent of the crop is grown under rainfed conditions, mainly in lower Burma. In upper Burma, the rice crop is largely dependent upon irrigation. Main season rice is planted in June and harvested in November and comprises 90 percent of total rice production. The second crop is planted in November and harvested in April. Rice output is lower this year because, in late August and early September, heavy rains caused flooding and area loss in the Irrawaddy and Pegu divisions. Also, fertilizer distribution was down for the fourth consecutive year -- declining by an average of roughly 25 percent per year. Since 60 percent of the crop is planted in high yielding varieties, the reduction in fertilizer applications is seriously affecting Burma's ability to produce higher yielding rice.

Corn, wheat, and millet production, estimated at 0.2 million, 0.1 million, and 0.1 million tons, respectively, has been relatively static for the past 5 years.

CAMBODIA AND LAOS

In 1991/92 Cambodia and Laos are expected to produce 1.3 and 0.9 million tons of rice (milled-basis), respectively. In Cambodia, the main season rice crop is planted in June-July and harvested in December-January and accounts for 80 percent of the total. The second season crop is planted in May-June and harvested in March. In Laos, rice is generally planted during June-August and harvested in November-December. Since irrigation is not well developed in these countries, production is more weather dependent than in neighboring countries. This season, excessive rain during late August and early September caused some rice areas to be abandoned due to flooding. Rice is the only significant grain crop produced in these countries.

Indonesia

Grain production in Indonesia for 1991/92 is estimated at 34.1 million tons, down 0.5 million or 1 percent from last year. Harvested area is estimated at 13.1 million hectares, down slightly from last year. Grain production over the past two decades has trended upward as both area and yield have increased.

Rice is the principal grain grown in Indonesia, comprising nearly 90 percent of total grain production. It is the most attractive investment in terms of risk and return. Rice output for 1991/92 is estimated at 28.9 million tons (milled-basis), down 2 percent from a record 29.4 million produced last year. Harvested area is expected to decline by 3 percent from last year's level to 10.2 million hectares. Java accounts for over 60 percent of the total rice crop and if sufficient irrigation water is available, rice is grown year-round. The onset of the monsoon was delayed last year so the main season crop, which is two-thirds of total production, was planted late. (Planting occurs in late October-March with harvesting in March-June.) However, the crop received adequate rainfall thereafter. The minor season rice crop (April-June planting and July-October harvesting) has experienced drought since June. Damage was confined primarily to those areas without adequate irrigation supplies, resulting in some abandonment of fields. Rainfall is needed before the end of October to enable Java's reservoirs to recharge before the next planting cycle.

Corn production for 1991/92 is forecast to be virtually unchanged from the record 5.2 million tons set last year. Harvested area is estimated at 2.9 million hectares, 2 percent above last year, but down 5 percent from the 1984/85 record. Corn is a secondary crop and is usually planted following the main rice harvest. A large fraction is planted for fodder and is cut before the grain has matured. The majority of the corn (main season) is planted following main season rice in November and harvested in January-February. The main season 1991/92 corn output (harvested in early 1991) was above average as farmers received adequate rain and planted additional area to high yielding hybrids. The minor season crop in Java (planted in June and harvested in August-September) was hurt by the prolonged drought. Estimated harvested area was reduced as small-scale producers cut their fields for fodder or abandoned the crop. Java produces about 60 percent of Indonesia's corn.

MALAYSIA

Malaysia's 1991/92 grain production is estimated at 1.0 million tons, down 0.2 million or 13 percent from last year. Harvested area is estimated down 8 percent to 0.6 million hectares. The area has been slowly declining over the past decade and production is at its lowest level since 1984/85. Rice is the principal grain grown in Malaysia, representing 97 percent of total grain, with corn accounting for the remaining 3 percent.

Rice output for 1991/92 is pegged at 1.0 million tons (milled-basis), down 13 percent from last year and 16 percent below the record 1.2 million produced in 1985/86. Over 90 percent of the crop is grown during the main season with planting in August-November and harvest in December-February. The second season crop is planted in April-May and harvested in July-October. The peninsula accounts for about 85 percent of Malaysia's rice production. This year's output was influenced by below normal rainfall that reduced water reserves crucial for irrigation. As a result, planted area fell to 0.6 million hectares.

The government has abandoned costly attempts to achieve self-sufficiency in rice production. Current policy aims at a self-sufficiency rate of 55-60 percent, and rice area has therefore stagnated. In addition, labor shortages have become a major problem in the rice sector as rural youths continue to migrate to urban areas or take better paying jobs in the oil palm/rubber estate sector. It is becoming increasingly common for rice producers to rely on seasonal workers from Thailand.

Philippines

Grain production in the Philippines for 1991/92 is estimated at 10.9 million tons, down 2 percent from the record of 11.1 million harvested last year. Harvested area is estimated at 7.2 million hectares, equaling the 1988/89 record. Area would have been higher, but growing evidence indicates that the eruptions of Mount Pinatubo and associated mudflows and flooding during the current wet-season have restricted plantings in southwestern Luzon. In addition, planting in the Visayas and Mindanao has been delayed by the late arrival of the monsoon.

Milled rice production is estimated at a 6.0 million tons, down 6 percent from last year's record crop. Rice is the most important crop in the Philippines in terms of both food supplies and value of production. It is grown throughout the country, with the major areas in central Luzon, the western Visayas, and southern Mindanao. Roughly 45 percent of the crop is grown during the main season with planting in July-September and harvest in November-January. The second (dry season) crop is planted in January-February and harvested in April-June. The Philippines also has a third, smaller crop which is planted in May-June and harvested in September-November. Rice yields have more than tripled since the early 1960's, largely due to the introduction of high yielding varieties, expanded areas under irrigation, and increased use of inputs.

The major eruptions of Mount Pinatubo this summer caused little damage to dry season rice production since most of that crop was already harvested. However, heavy ash and subsequent mud slides triggered by tropical storms have covered much of the normal rice area on Luzon and have reduced plantings of the main, wet-season crop. The late start of the July-December wet season has also delayed planting in Visayas and parts of Mindanao and will likely push harvest back into the beginning of the dry season.

Corn production is estimated at a record 4.9 million tons, up 3 percent from last year. This is the second consecutive year of record corn production in the Philippines. Corn is grown throughout the Philippines and in terms of value and producer income is the third most important agricultural commodity produced, after rice and coconut. Most of the corn is produced on the island of Mindanao where there is normally ample rainfall and little typhoon damage. Higher support prices and the increased use of hydrid seed and fertilizers over the past few years are the primary reasons for these record crops. Yields have trended upward over the past decade; however, the cost of inputs has increased to the point where producers are beginning to reduce applications.

Thailand

Thailand's 1991/92 total grain production is forecast at 17.2 million tons, up 11 percent from last season's 15.5 million tons, but down 10 percent from the 1985/86 record. Harvested area for grains is estimated at 11.5 million hectares, up 3 percent from last year, but down 7 percent from the record 12.3 million in 1985. Grain plantings have trended downward since 1985/86, mainly because some corn area has been replaced by soybeans and sugarcane.

Rice is the predominate crop in Thailand, occupying roughly 87 percent of the harvested grain area in 1991/92 and representing about 77 percent of Thailand's total grain production. Eighty percent of the rice is grown during the main season with planting in May-June and harvesting in November-January. The second season crop is planted in December-June and harvested in March-October. Milled rice production for 1991/92 is estimated at 13.2 million tons, up 16 percent over last season's drought and insect damaged crop. Overall rice production in the Northeast was above average while the southeastern portion of the Central region experienced some heavy rainfall which reduced yields. While rainfall in the North has been below average, tropical storms that moved across the region in recent months relieved much of the dryness. Infestations of brown plant hopper that damaged much of last year's crop have not been a factor so far due to increased rainfall. Rice yields for 1991/92 are expected to reach 2.00 tons per hectare, up sharply from last year's 1.79 tons per hectare.

Corn production for 1991/92 is estimated at 3.7 million tons, down 3 percent from last year's 3.8 million and down 31 percent from the 1985 level of 5.4 million. Harvested area has declined steadily from a peak of 2.3 million hectares in 1985 to 1.3 million this year. Rainfall is the main determinant in corn crop size since it is planted almost entirely on unirrigated land. Severe drought last season in the main producing regions of the Upper Central Plain, the Lower North, and the Lower Northeast, caused some producers to shift to more drought tolerant crops such as sorghum, beans, and manioc this year. Also, some area was converted to soybeans and sugarcane because of their attractive prices relative to corn.

Sorghum is a minor crop in Thailand and is seeded following the harvest of the first corn crop. Production in 1991/92 is expected to reach 0.3 million tons from an area of 0.2 million hectares.

VIETNAM

Vietnam's 1991/92 grain production is estimated at 12.8 million tons, down 0.6 million or 5 percent from last year. Harvested area is estimated at 6.4 million hectares, up 3 percent from the previous year. Since the early 1980's, grain production has trended upward as the Government began privatizing farms. Rice is the principal grain grown, encompassing 94 percent of total grain production; corn comprises the remaining 6 percent.

Rice production on a milled-basis is estimated at 11.9 million tons, down 5 percent from last year. Estimated area increased 4 percent from 1990/91 to 5.9 million hectares. Planting conditions this year appear to have been, on balance, better than last year. Vietnam produces rice year-round, with the crop divided into three seasons: the rainy season crop, planted in August-September and harvested in January-February; the winter-spring crop, planted in January-February and harvested in April-May; and the summer-autumn crop, planted in April-May and harvested in August-September. The winter-spring crop accounts for about 40 percent of total rice production, while the summer-autumn and rainy season crops account for about 30 percent each. Almost 60 percent of the crop is grown in the south along the Mekong delta, with the remainder produced from the north in the Red River delta.

Farmers grow native varieties for the rainy season crop and high yielding varieties, with a shorter maturity period, in both the winter-spring and summer-autumn crops. This year, excellent weather prevailed throughout the growing seasons in the Mekong delta, but in parts of the Red River delta, excessive rain reduced yields. Generally good weather, lack of brown plant hopper damage, and a recovery from last year's fertilizer shortage is seen lifting production over the previous year's level. Little information is received on corn output, but it has generally been trending upward.

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TABLE 9

SOUTHEAST ASIA GRAIN PRODUCTION

(1,000 METRIC TONS)

	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92
Burma										
Corn	232	309	303	299	285	224	188	194	186	190
Millet	83	85	85	85	85	85	113	116	138	145
Rice, Milled	6,850	7,200	7,075	7,130	7,080	6,840	7,500	8,100	8,220	7,560
Wheat	130	214	206	190	192	157	130	124	135	140
TOTAL GRAINS	7,295	7,808	7,669	7,704	7,642	7,306	7,931	8,534	8,679	8,035
Cambodia										
Corn	46	40	40	40	40	40	40	55	55	50
Rice, Milled	1,260	1,260	945	1,134	1,260	1,325	1,575	1,700	1,560	1,325
TOTAL GRAINS	1,306	1,300	985	1,174	1,300	1,365	1,615	1,755	1,615	1,375
Indonesia										
Corn	3,235	5,087	5,288	4,330	5,000	4,800	5,200	5,000	5,200	5,200
Rice, Milled	22,837	24,006	25,933	26,542	26,500	27,000	27,500	29,072	29,366	28,850
TOTAL GRAINS	26,072	29,093	31,221	30,872	31,500	31,800	32,700	34,072	34,566	34,050
Laos										
Rice, Milled	703	650	780	875	894	732	651	850	900	900
TOTAL GRAINS	703	650	780	875	894	732	651	850	900	900
Malaysia										
Corn	20	22	24	25	26	30	32	34	35	36
Rice, Milled	1,059	1,145	943	1,191	1,124	1,092	1,148	1,147	1,160	1,000
TOTAL GRAINS	1,079	1,167	967	1,216	1,150	1,122	1,180	1,181	1,195	1,036
Philippines										
Corn	3,126	3,346	3,439	3,922	4,016	4,380	4,525	4,500	4,700	4,850
Rice, Milled	5,025	5,097	5,330	5,913	5,831	5,642	5,996	5,785	6,424	6,045
TOTAL GRAINS	8,151	8,443	8,769	9,835	9,847	10,022	10,521	10,285	11,124	10,895
Thailand										
Corn	3,450	3,950	4,350	5,350	4,309	2,736	4,200	4,100	3,800	3,700
Sorghum	236	327	374	320	280	210	230	230	250	250
Rice, Milled	11,139	12,902	13,137	13,374	12,453	11,908	14,035	13,317	11,418	13,200
TOTAL GRAINS	14,825	17,179	17,861	19,044	17,042	14,854	18,465	17,647	15,468	17,150
Vietnam										
Corn	437	467	525	525	550	575	815	843	850	900
Rice, Milled	9,210	9,583	10,079	10,317	10,402	9,817	11,050	12,537	12,540	11,880
TOTAL GRAINS	9,647	10,050	10,604	10,842	10,952	10,392	11,865	13,380	13,390	12,780
Southeast Asia										
Corn	10,546	13,221	13,969	14,491	14,226	12,785	15,000	14,726	14,826	14,926
Millet	83	85	85	85	85	85	113	116	138	145
Sorghum	236	327	374	320	280	210	230	230	250	250
Rice, Milled	58,083	61,843	64,222	66,476	65,544	64,356	69,455	72,508	71,588	70,760
Wheat	130	214	206	190	192	157	130	124	135	140
TOTAL GRAINS	69,078	75,690	78,856	81,562	80,327	77,593	84,928	87,704	86,937	86,221

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 10

SOUTHEAST ASIA GRAIN AREA

(1,000 HECTARES)

	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92
Burma										
Corn	179	208	229	199	179	160	121	123	123	125
Millet	177	180	180	180	180	180	156	175	177	180
Rice, Milled	4,560	4,661	4,603	4,660	4,666	4,483	4,527	4,733	4,797	4,500
Wheat	109	143	131	120	119	127	120	121	130	135
TOTAL GRAINS	*5,025*	*5,192*	*5,143*	*5,159*	*5,144*	*4,950*	*4,924*	*5,152*	*5,227*	*4,940*
Cambodia										
Corn	30	35	35	35	35	35	35	25	25	22
Rice, Milled	1,650	1,700	1,400	1,550	1,600	1,600	1,800	1,800	1,750	1,750
TOTAL GRAINS	*1,680*	*1,735*	*1,435*	*1,585*	*1,635*	*1,635*	*1,835*	*1,825*	*1,775*	*1,772*
Indonesia										
Corn	2,061	3,002	3,086	2,440	3,047	2,675	2,850	2,700	2,850	2,900
Rice, Milled	8,988	9,162	9,764	9,902	9,896	9,800	9,800	10,530	10,502	10,200
TOTAL GRAINS	*11,049*	*12,164*	*12,850*	*12,342*	*12,943*	*12,475*	*12,650*	*13,230*	*13,352*	*13,100*
Laos										
Rice, Milled	664	647	680	730	730	675	650	700	860	750
TOTAL GRAINS	*664*	*647*	*680*	*730*	*730*	*675*	*650*	*700*	*860*	*750*
Malaysia										
Corn	14	14	15	15	15	17	18	19	20	20
Rice, Milled	635	648	606	655	621	629	655	612	635	580
TOTAL GRAINS	*649*	*662*	*621*	*670*	*636*	*646*	*673*	*631*	*655*	*600*
Philippines										
Corn	3,157	3,270	3,314	3,545	3,563	3,725	3,750	3,625	3,800	3,900
Rice, Milled	3,240	3,141	3,222	3,403	3,402	3,280	3,485	3,445	3,433	3,335
TOTAL GRAINS	*6,397*	*6,411*	*6,536*	*6,948*	*6,965*	*7,005*	*7,235*	*7,070*	*7,233*	*7,235*
Thailand										
Corn	1,850	1,825	1,955	2,266	1,815	1,754	1,600	1,400	1,350	1,320
Sorghum	236	251	284	241	223	204	170	160	180	170
Rice, Milled	8,940	9,606	9,629	9,833	9,659	9,237	9,917	9,986	9,650	10,000
TOTAL GRAINS	*11,026*	*11,682*	*11,868*	*12,340*	*11,697*	*11,195*	*11,687*	*11,546*	*11,180*	*11,490*
Vietnam										
Corn	379	378	384	400	420	430	511	510	507	515
Rice, Milled	5,709	5,611	5,675	5,704	5,689	5,577	5,775	5,710	5,710	5,920
TOTAL GRAINS	*6,088*	*5,989*	*6,059*	*6,104*	*6,109*	*6,007*	*6,286*	*6,220*	*6,217*	*6,435*
SOUTHEAST ASIA										
Corn	7,670	8,732	9,018	8,900	9,074	8,796	8,885	8,402	8,675	8,802
Millet	177	180	180	180	180	180	156	175	177	180
Sorghum	236	251	284	241	223	204	170	160	180	170
Rice, Milled	34,386	35,176	35,579	36,437	36,263	35,281	36,609	37,516	37,337	37,035
Wheat	109	143	131	120	119	127	120	121	130	135
TOTAL GRAINS	*42,578*	*44,482*	*45,192*	*45,878*	*45,859*	*44,588*	*45,940*	*46,374*	*46,499*	*46,322*

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 11

SOUTHEAST ASIA GRAIN YIELD

(TONS PER HECTARE)

	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92
Burma										
Corn	1.30	1.49	1.32	1.50	1.59	1.40	1.55	1.58	1.51	1.52
Millet	0.47	0.47	0.47	0.47	0.47	0.47	0.72	0.66	0.78	0.81
Rice, Milled	1.50	1.54	1.54	1.53	1.52	1.53	1.66	1.71	1.71	1.68
Wheat	1.19	1.50	1.57	1.58	1.61	1.24	1.08	1.02	1.04	1.04
TOTAL GRAINS	*1.45*	*1.50*	*1.49*	*1.49*	*1.49*	*1.48*	*1.61*	*1.66*	*1.66*	*1.63*
Cambodia										
Corn	1.53	1.14	1.14	1.14	1.14	1.14	1.14	2.20	2.20	2.27
Rice, Milled	0.76	0.74	0.68	0.73	0.79	0.83	0.88	0.94	0.89	0.76
TOTAL GRAINS	*0.78*	*0.75*	*0.69*	*0.74*	*0.80*	*0.83*	*0.88*	*0.96*	*0.91*	*0.78*
Indonesia										
Corn	1.57	1.69	1.71	1.77	1.64	1.79	1.82	1.85	1.82	1.79
Rice, Milled	2.54	2.62	2.66	2.68	2.68	2.76	2.81	2.76	2.80	2.83
TOTAL GRAINS	*2.36*	*2.39*	*2.43*	*2.50*	*2.43*	*2.55*	*2.58*	*2.58*	*2.59*	*2.60*
Laos										
Rice, Milled	1.06	1.00	1.15	1.20	1.22	1.08	1.00	1.21	1.05	1.20
TOTAL GRAINS	*1.06*	*1.00*	*1.15*	*1.20*	*1.22*	*1.08*	*1.00*	*1.21*	*1.05*	*1.20*
Malaysia										
Corn	1.43	1.57	1.60	1.67	1.73	1.76	1.78	1.79	1.75	1.80
Rice, Milled	1.67	1.77	1.56	1.82	1.81	1.74	1.75	1.87	1.83	1.72
TOTAL GRAINS	*1.66*	*1.76*	*1.56*	*1.81*	*1.81*	*1.74*	*1.75*	*1.87*	*1.82*	*1.73*
Philippines										
Corn	0.99	1.02	1.04	1.11	1.13	1.18	1.21	1.24	1.24	1.24
Rice, Milled	1.55	1.62	1.65	1.74	1.71	1.72	1.72	1.67	1.87	1.81
TOTAL GRAINS	*1.27*	*1.32*	*1.34*	*1.42*	*1.41*	*1.43*	*1.45*	*1.45*	*1.54*	*1.51*
Thailand										
Corn	1.86	2.16	2.23	2.36	2.37	1.56	2.63	2.93	2.81	2.80
Sorghum	1.00	1.30	1.32	1.33	1.26	1.03	1.35	1.44	1.39	1.47
Rice, Milled	1.25	1.34	1.36	1.36	1.29	1.29	1.42	1.33	1.18	1.32
TOTAL GRAINS	*1.34*	*1.47*	*1.50*	*1.54*	*1.46*	*1.33*	*1.45*	*1.53*	*1.38*	*1.49*
Vietnam										
Corn	1.15	1.24	1.37	1.31	1.31	1.34	1.59	1.65	1.68	1.75
Rice, Milled	1.61	1.71	1.78	1.81	1.83	1.76	1.91	2.20	2.20	2.01
TOTAL GRAINS	*1.58*	*1.68*	*1.75*	*1.78*	*1.79*	*1.73*	*1.89*	*2.15*	*2.15*	*1.99*
SOUTHEAST ASIA										
Corn	1.37	1.51	1.55	1.63	1.57	1.45	1.69	1.75	1.71	1.70
Millet	0.47	0.47	0.47	0.47	0.47	0.47	0.72	0.66	0.78	0.81
Sorghum	1.00	1.30	1.32	1.33	1.26	1.03	1.35	1.44	1.39	1.47
Rice, Milled	1.69	1.76	1.81	1.82	1.81	1.82	1.90	1.93	1.92	1.91
Wheat	1.19	1.50	1.57	1.58	1.61	1.24	1.08	1.02	1.04	1.04
TOTAL GRAINS	*1.62*	*1.70*	*1.74*	*1.78*	*1.75*	*1.74*	*1.85*	*1.89*	*1.87*	*1.86*

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Production Estimates and Crop Assessment Division, FAS, USDA

INDIA AND BANGLADESH FIELD TRIP REPORT

USDA Foreign Agricultural Service (FAS) personnel traveled in the major growing regions of India and Bangladesh during the month of September, 1991. The following is the result of extensive farm visits and discussions with growers, trade officials, university agricultural staff, and Indian and Bangladesh Government officials.

Overall growing conditions in both India and Bangladesh have been less than ideal during the monsoon season (June-September) of 1991, with significant regional rainfall deficiencies in India. The reduced kharif (autumn) harvest outlook for grains has provided new pressure to achieve increased grain and oilseed output during the winter or "rabi" growing season. Government targets for rabi crop production have been revised upward by 8.0 million tons in an effort to maintain total foodgrain output growth as previously targeted. Planting conditions for the upcoming winter growing season are variable and winter rainfall therefore will be of greater importance this year. Total grain production in India for 1991/92 is currently estimated at 157.0 million tons, down 0.5 million or less than 1 percent from last year. This includes reduced output of rice, corn, millet, and sorghum.

INDIA:

Milled rice production in 1991/92 is estimated at 71.5 million tons, down 3.1 million or 4 percent from a record 1990/91 harvest of 74.6 million. The FAS team observed variable field conditions for the 1991/92 kharif rice crop in India, based on differences in summer monsoon rainfall distribution. Major problems were encountered by growers in the northern Gangetic plains, from Punjab in the northwest to West Bengal in the northeast. Rice area reductions were reported in Punjab, Haryana, Uttar Pradesh, Rajasthan, Bihar, and West Bengal owing to drought. Accentuating the problem in the primarily irrigated northwest states was the shortage of electrical power supplies to drive irrigation equipment.

Total rice area in India in 1991/92 is estimated down by 1.5 million hectares, with most of the losses occurring in Uttar Pradesh and Bihar. Sparse and intermittent rainfall in Uttar Pradesh and Bihar also caused much of the kharif rice crop to be transplanted late, therefore reaching sensitive reproductive growth stages during the dry post-monsoon period. Growers and officials alike were concerned with the outlook for the October and November rainfall or "hatia" rains. Further yield reductions in this region are likely if autumn rainfall is disappointing. Rice crops in other Indian states appeared in much more favorable condition, either owing to adequate irrigation supplies or plentiful monsoon showers. Production increases are expected in the important southern states of Andhra Pradesh and Tamil Nadu. Lower producing states where prospects are very favorable include Madhya Pradesh, Karnataka, and Kerala.

Millet production in India is estimated at 9.5 million tons, down 0.8 million or 8 percent from last year. The 1991/92 millet crop in India suffered extensively from dry conditions in the important northwest growing states. Millet area and yield reductions were reported in Haryana, Rajasthan, Uttar Pradesh, Gujarat, and western Madhya Pradesh. This region typically accounts for 70 percent of total millet area and nearly 80 percent of total production. Travel though the region substantiated discussions with officials in New Delhi, in that large rainfed areas returned to fallow this summer when early rainfall failed. Farmers expected yields to decline significantly, with the main harvest occurring in October. Most growers were observed cultivating fallow lands in preparation for winter crop sowings. Farmers in Rajasthan and western Haryana are currently planning to take advantage of any favorable autumn precipitation by increasing winter rapeseed and pulse area. Depending on the arrival of winter storm systems from Soviet Central Asia, this arid zone collectively acts as a swing production region. For example, the record 5.4 million ton rapeseed harvest in 1990/91 was largely possible owing to increased plantings in Rajasthan. Late monsoon rainfall in October 1990 set the stage for higher rainfed plantings in the region, while timely winter showers boosted rapeseed yields to record levels.

Corn production in 1991/92 in India is estimated at 8.4 million tons, down 1.0 million or 11 percent from last year's record harvest of 9.4 million. Corn output in 1991/92 has also been significantly affected by poor rainfall during the summer monsoon season. Corn area was significantly reduced in the primary growing states of Uttar Pradesh, Rajasthan, and Bihar, which collectively account for about 45 percent of total harvested area. Corn area is currently estimated to have declined 400,000 hectares or 7 percent from last year, to 5.7 million hectares. Corn yields are estimated slightly above average owing to the potential of winter grown crops in the northern state of Bihar. Planting moisture for winter corn in Bihar is plentiful due to very heavy September rains which created waterlogged conditions across the corn growing region.

The corn production outlook in the major southern state of Andhra Pradesh is mixed, as field visits confirmed that summer drought had negatively affected pollination and grainfill stages. Summer yields were reportedly disappointing, but winter crops were planned to offset some of the decline in output. Corn prices in the region were very high, adding incentive to increased plantings during the winter and in 1992/93. Corn was noted to be in great demand from a rapidly expanding poultry sector and from the starch industry. Record corn prices have been in effect for most of the 1991/92 growing season and are forecast to rise even higher in 1992/93 by private trade officials.

Peanut production in India during 1991/92 is estimated at 8.2 million tons, up 0.1 million or 1 percent from last year's harvest. Major peanut production operations were observed by extensive travel in the Saurashtra peanut cultivating heartland of Gujarat State. Field travel and interviews with a varied group of oilseed concerns verified that the state had experienced a difficult summer growing period. It was apparent that the major planting efforts that followed late monsoon showers in July had been successful. Peanut area in Gujarat had reportedly increased by approximately 275,000 hectares over last year, primarily sown to short season bunch varieties (90-120 days). However, monsoon showers had essentially ceased by early to mid-August, leaving the peanut crop in severe moisture stress for most of September. This dry period occurred simultaneously with major reproductive growth stages and will seriously affect crop yields in the state. Most of the field crops observed had developed well through vegetative stages and appeared well fertilized. Typically, the crop reached flowering and pegging stages just as moisture availability was becoming acutely short. Flower set was low, pegs were observed withering in the air, and pod development was weak. The soils were hard crusted, offering a barrier to future pegging. Officials and growers alike reported that the crop required two additional rains, one in mid-September followed by finishing rains in early October. These crop-saving rains never materialized and thus yields are expected to closely reflect other drought years. Gujarat normally accounts for 25 percent of national peanut area and 20 percent of total production. Owing to the disappointing summer crop season in Gujarat, Indian peanut production in 1991/92 is estimated at 8.2 million tons, only marginally higher than the drought affected harvest of 8.1 million in 1990/91.

Cotton production in India in 1991/92 is estimated at 10.0 million (480-lb) bales, up 0.9 million or 10 percent from last year's rain and pest damaged harvest. Cotton production was observed in a variety of states including Haryana, Rajasthan, Punjab, Gujarat, and Andhra Pradesh. The 1991/92 crop situation is generally favorable despite the summer drought which affected grain and oilseed production. Cotton was observed growing primarily under irrigation with low levels of pest and disease problems reported due to the dry weather. Farmers were expecting improved yields, with growers in Punjab and Rajasthan possibly approaching record yields. Pest problems, including boll weevil and white fly infestations were seen being actively addressed by contract operators using hand spraying techniques of insecticide application. Most states had crops in early flowering and boll setting growth stages, with early pickings (first of 4-6) observed in only a few areas. Despite high domestic cotton prices, cotton area in 1991/92 is estimated at 7.27 million hectares, slightly lower than last year. Total cotton sowings in India declined in key central and western states, reportedly due to poor monsoon rains in Gujarat and diversion of area to competing oilseed crops in Maharashtra and Madhya Pradesh. Overall cotton yields are estimated higher due to a lack of significant pest or excessive rainfall damage this season.

BANGLADESH:

Bangladesh's important main season rice crop, or Aman rice, has been periodically inundated by several serious floods this summer. Rice production in 1991/92 is still expected to reach record levels, as planting efforts continued when floodwaters receded. Aiding this recovery are rice varieties which do not have a defined growing season other than total days to harvest (photo insensitive varieties). Therefore, total winter rice area will likely reflect the increase from plantings in flood affected areas.

Total grain production in Bangladesh is estimated at a record 19.6 million tons, up 0.7 million or 4 percent from 1990/91. Milled rice production is currently estimated at a record 18.4 million tons, up 0.5 million or 3 percent from last year. Wheat output is estimated to rise to 1.1 million tons, up 0.2 million or 22 percent from 1990/91.

In Bangladesh, field conditions generally were favorable except in areas experiencing significant flooding during late September. Despite the flood effects, officials expressed very little concern to our group about the outlook for 1991/92 foodgrain production. Rice accounts for approximately 96 percent of total foodgrain production, therefore it would accord significant attention if threatened. Rice observed in the field was in peak condition, with the majority in vegetative growth stages. As is typical for the country, rice was seen in a great variety of stages, from pre-transplanting to harvest. In riverine and low lying areas affected by serious flooding during September, Aman rice area losses were expected to be at near normal levels. Post-flood plantings in October and November are expected to replace much of the crop which was lost or damaged. Further efforts will be made to improve yields on the important winter rice crop, called "boro" rice, to offset Aman losses as well. Any Aman rice areas which were submerged and replanted will be harvested in the winter months, effectively adding to the size of the 1991/92 boro harvest.

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TABLE 12

INDIAN GRAIN: AREA, YIELD, AND PRODUCTION

		Harvested Area (Million Hectares)	Yield (Tons Per Hectare)	Production (Million Tons)
Barley				
	1982	1.73	1.15	1.99
	1983	1.48	1.26	1.87
	1984	1.39	1.32	1.83
	1985	1.25	1.24	1.56
	1986	1.37	1.43	1.96
	1987	1.23	1.36	1.67
	1988	1.14	1.38	1.58
	1989	1.08	1.59	1.72
	1990	0.99	1.48	1.47
	1991	1.02	1.59	1.62
Corn				
	1982	5.72	1.15	6.55
	1983	5.86	1.35	7.92
	1984	5.80	1.46	8.44
	1985	5.80	1.15	6.64
	1986	5.87	1.27	7.46
	1987	5.56	1.03	5.72
	1988	5.90	1.40	8.23
	1989	5.86	1.61	9.41
	1990	6.10	1.54	9.40
	1991	5.70	1.47	8.50
Millet				
	1982	16.85	0.51	8.58
	1983	18.03	0.68	12.23
	1984	16.22	0.60	9.77
	1985	16.21	0.46	7.40
	1986	16.70	0.50	8.29
	1987	13.85	0.50	6.87
	1988	17.11	0.66	11.35
	1989	15.86	0.66	10.51
	1990	15.00	0.69	10.30
	1991	15.00	0.63	9.50
Sorghum				
	1982	16.38	0.66	10.75
	1983	16.43	0.73	11.92
	1984	15.94	0.72	11.40
	1985	16.10	0.63	10.20
	1986	15.64	0.57	8.87
	1987	16.00	0.59	9.50
	1988	14.60	0.70	10.17
	1989	14.95	0.86	12.91
	1990	14.75	0.82	12.10
	1991	15.00	0.80	12.00

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Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 12 (Continued)

INDIAN GRAIN: AREA, YIELD, AND PRODUCTION

	Harvested Area (Million Hectares)	Yield (Tons Per Hectare)	Production (Million Tons)
Rice (Milled)			
1982	38.26	1.85	47.12
1983	41.22	2.19	60.10
1984	41.16	2.13	58.34
1985	41.14	2.33	63.83
1986	40.77	2.22	60.42
1987	38.81	2.20	56.86
1988	41.74	2.53	70.49
1989	42.18	2.63	74.05
1990	42.60	2.63	74.60
1991	41.10	2.61	71.50
Wheat			
1982	22.14	1.69	37.45
1983	23.57	1.82	42.79
1984	24.67	1.84	45.48
1985	23.56	1.87	44.07
1986	23.00	2.05	47.05
1987	23.13	1.92	44.32
1988	23.06	2.00	46.17
1989	24.11	2.24	54.11
1990	23.46	2.12	49.65
1991	24.27	2.23	54.00
Coarse Grains			
1982	40.68	0.69	27.88
1983	41.80	0.81	33.94
1984	39.35	0.80	31.45
1985	39.35	0.66	25.80
1986	39.59	0.67	26.57
1987	36.64	0.65	23.76
1988	38.75	0.81	31.33
1989	37.74	0.92	34.56
1990	36.84	0.90	33.27
1991	36.72	0.86	31.52
Total Grains			
1982	101.08	1.11	112.45
1983	106.59	1.28	136.83
1984	105.18	1.29	135.26
1985	104.06	1.28	133.69
1986	103.36	1.30	134.04
1987	98.57	1.27	124.94
1988	103.54	1.43	147.99
1989	104.03	1.56	162.72
1990	102.90	1.53	157.52
1991	102.09	1.54	157.02

October 1991 Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 13

INDIAN OILSEED: AREA, YIELD, AND PRODUCTION

		Harvested Area (Million Hectares)	Yield (Tons Per Hectare)	Production (Million Tons)
Cottonseed				
	1982	7.87	0.39	3.05
	1983	7.72	0.34	2.65
	1984	7.38	0.47	3.45
	1985	7.53	0.49	3.65
	1986	6.95	0.46	3.22
	1987	6.47	0.50	3.20
	1988	7.34	0.51	3.71
	1989	7.33	0.60	4.40
	1990	7.36	0.53	3.90
	1991	7.30	0.59	4.30
Flaxseed				
	1982	1.40	0.27	0.38
	1983	1.49	0.30	0.44
	1984	1.40	0.28	0.39
	1985	1.42	0.27	0.38
	1986	1.16	0.27	0.32
	1987	1.15	0.34	0.39
	1988	1.20	0.30	0.36
	1989	1.18	0.29	0.34
	1990	1.17	0.31	0.36
	1991	1.10	0.32	0.35
Peanut				
	1982	7.22	0.73	5.28
	1983	7.54	0.94	7.09
	1984	7.17	0.90	6.44
	1985	7.12	0.72	5.12
	1986	6.98	0.84	5.88
	1987	6.84	0.86	5.85
	1988	8.53	1.06	9.00
	1989	8.71	0.93	8.09
	1990	8.65	0.93	8.08
	1991	8.70	0.94	8.20
Rapeseed				
	1982	3.83	0.58	2.21
	1983	3.87	0.67	2.61
	1984	3.99	0.77	3.07
	1985	3.98	0.67	2.68
	1986	3.72	0.70	2.61
	1987	4.62	0.75	3.46
	1988	4.83	0.91	4.38
	1989	4.99	0.83	4.12
	1990	5.72	0.94	5.40
	1991	5.70	0.88	5.00

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Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 13 (Continued)

INDIAN OILSEED: AREA, YIELD, AND PRODUCTION

	Harvested Area (Million Hectares)	Yield (Tons Per Hectare)	Production (Million Tons)
Soybean			
1982	0.77	0.64	0.49
1983	0.84	0.73	0.61
1984	1.24	0.77	0.96
1985	1.34	0.76	1.02
1986	1.53	0.58	0.89
1987	1.54	0.58	0.90
1988	1.73	0.89	1.55
1989	2.13	0.80	1.72
1990	2.39	1.02	2.44
1991	2.65	1.02	2.70
Sunflowerseed			
1982	0.46	0.50	0.23
1983	0.70	0.43	0.30
1984	0.84	0.53	0.44
1985	0.75	0.37	0.28
1986	0.99	0.44	0.44
1987	1.65	0.39	0.64
1988	1.10	0.34	0.37
1989	1.42	0.42	0.59
1990	1.58	0.54	0.85
1991	1.75	0.53	0.93
Total Oilseeds			
1982	21.55	0.56	11.97
1983	22.15	0.63	14.00
1984	22.01	0.69	15.10
1985	22.14	0.61	13.51
1986	21.32	0.64	13.66
1987	22.28	0.66	14.74
1988	24.74	0.80	19.70
1989	25.97	0.76	19.61
1990	26.87	0.80	21.38
1991	27.17	0.80	21.84

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Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 14

INDIAN COTTON: AREA, YIELD, AND PRODUCTION

	Harvested Area (Million Hectares)	Yield (Tons Per Hectare)	Production (Million Bales)
Cotton			
1982	7.87	0.19	6.76
1983	7.72	0.17	6.12
1984	7.38	0.25	8.36
1985	7.53	0.26	9.02
1986	6.95	0.23	7.25
1987	6.47	0.24	7.14
1988	7.34	0.25	8.28
1989	7.33	0.32	10.60
1990	7.36	0.27	9.14
1991	7.30	0.30	10.00

TABLE 15

BANGLADESH GRAIN: AREA, YIELD, AND PRODUCTION

	Harvested Area (Million Hectares)	Yield (Tons Per Hectare)	Production (Million Tons)
Rice (Milled)			
1982	10.59	2.02	14.22
1983	10.55	2.06	14.50
1984	10.14	2.16	14.62
1985	10.40	2.17	15.04
1986	10.61	2.18	15.41
1987	10.32	2.24	15.41
1988	10.22	2.28	15.55
1989	10.48	2.56	17.86
1990	10.40	2.59	17.93
1991	10.50	2.63	18.40
Wheat			
1982	0.52	2.11	1.10
1983	0.53	2.28	1.21
1984	0.68	2.17	1.46
1985	0.54	1.93	1.04
1986	0.59	1.87	1.09
1987	0.59	1.87	1.09
1988	0.56	1.82	1.02
1989	0.59	1.50	0.89
1990	0.60	1.50	0.90
1991	0.60	1.83	1.10
Total Grains			
1982	11.18	1.37	15.36
1983	11.15	1.41	15.76
1984	10.89	1.48	16.14
1985	11.01	1.47	16.14
1986	11.27	1.47	16.55
1987	10.97	1.51	16.55
1988	10.84	1.53	16.61
1989	11.13	1.69	18.80
1990	11.06	1.71	18.88
1991	11.16	1.75	19.55

DECIDUOUS FRUIT AND TABLE GRAPE SITUATION

APPLES: Apple production in selected Northern Hemisphere countries for the 1991/92 season is forecast to total 15.78 million tons, down 14 percent from the year earlier level. The apple crop in the United States is estimated up 4 percent, as most eastern States had favorable growing weather. Canada's production potential was hurt by severely cold December 1990 weather that stressed trees in British Columbia. Current estimates show EC output at 5.66 million tons, down almost 30 percent from 1990/91. A widespread April freeze, followed by cold, wet weather, caused heavy losses over most of the EC's apple growing regions, particularly north of the Alps. In northern EC countries, only the United Kingdom and Ireland did not suffer significant damage from the cold. Apple crops in Germany and France, two of the larger producers, are estimated down 42 and 38 percent, respectively, while estimated production in the Netherlands is down by more than half. Italian output, forecast down 1 percent, suffered some damage from frost and cold spring weather, especially in the northern apple growing regions.

In other regions, European apple production outside the EC is projected down 2 percent, mainly due to freeze damage in Switzerland and excessive moisture and cool weather at pollination time in Yugoslavia. Generally favorable growing conditions produced larger harvests in Turkey and Hungary. In Asia, a late September typhoon hit Japan's apple growing provinces and caused severe losses. Preliminary estimates indicate that over half the crop was lost in Amori, the major apple producing province. Compared to 1990/91, Japan's apple output is estimated to be down 48 percent. In the Southern Hemisphere, revised estimates for all countries except Chile have pulled the 1990/91 hemispheric total to 2.93 million tons, 3 percent below the 1989/90 level. Scattered frosts in early October in the Rio Negro area could reduce Argentina's 1991/92 crop.

PEARS: Pear production in selected Northern Hemisphere countries for 1991/92 is estimated at 3.86 million tons, down 9 percent from last year's level. Output in the United States is forecast to decline nearly 10 percent. West Coast Bartlett production is estimated down 12 percent as fruit development was slowed by a cold spring. The April freeze in the EC is forecast to have caused a 23-percent decline in EC pear production, with Germany and France each having declines in excess of 40 percent. Production in Italy is forecast down 17 percent from last year's good harvest, largely due to cold-weather damage. In Non-EC Europe, pear production is expected to be little changed from the 1990/91 level, as a favorable crop in Turkey offsets estimated declines in the countries affected by the spring freeze. Japan's pears were largely harvested before the late September typhoon; therefore, damage from the typhoon was not as severe as for apples.

STONE FRUITS: Apricot production for 1991 in selected countries is currently estimated at 1.21 million tons, up 7 percent from last year's level. In Europe, estimated production in Spain and Turkey is up sharply compared to last year's reduced harvest. Output in Greece is estimated to have declined as the impact of an "off" year was compounded by a cold wet spring which hindered fruit set.

Peach and nectarine production in selected countries is forecast to total 6.27 million tons, down 2 percent, due largely to weather related declines in Europe. Production in the United States is estimated up 13 percent as favorable growing conditions in the eastern States offset a small decline in the West. Revised production estimates for Argentina pulled the Southern Hemisphere total down 5 percent.

Cherry production in selected countries is preliminarily estimated at 955,000 tons, down 22 percent from 1990. Freeze damage to European cherries caused most of the loss at the aggregate level. Estimated production in the United States is down nearly a fourth. Washington and Oregon had reduced cherry crops largely due to excessive June rains, while Michigan's output was hurt by spring freezes.

TABLE GRAPES: Although a 1991 forecast is not yet available for the United States, preliminary estimates indicate Northern Hemisphere table grape production will decline for the fifth consecutive season. Italy's crop, the largest in the Hemisphere, is expected to decline to 1.16 million tons, 4 percent below the 1990 crop. This continues the long-term downward trend that characterized most of the last decade. The cold spring took a severe toll on French production. After more than a decade of steady increases, Chile's 1991 production is estimated to have declined slightly due to reduced yields. Unusually warm weather during the winter months, followed by a cold spring, upset the normal cycle of plant and fruit development in Chile.

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TABLE 16

APPLE PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric Tons)

	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92 1/
NORTHERN HEMISPHERE										
NORTH AMERICA:										
Canada	477.6	484.9	434.4	478.6	388.2	505.9	500.7	536.7	505.8	495.0
Mexico	394.4	302.4	486.3	442.8	628.9	615.4	624.3	545.0	520.0	580.0
United States	3,684.1	3,800.4	3,775.7	3,589.9	3,564.8	4,872.5	4,140.4	4,519.0	4,398.4	4,593.8
Total	4,556.1	4,587.7	4,696.4	4,511.3	4,581.8	5,993.8	5,265.4	5,600.8	5,424.2	5,668.8
EUROPEAN COMMUNITY:										
Bel-Lux	270.3	203.4	230.9	221.1	269.6	236.3	271.6	322.2	235.1	122.6
Danmark	119.5	77.2	124.4	95.1	93.0	46.5	90.2	85.0	70.0	55.0
France	1,977.5	1,574.9	2,004.8	1,793.0	1,867.3	1,985.4	1,934.7	1,818.2	1,865.0	1,083.1
Germany	2,637.1	1,313.1	1,799.3	1,409.7	2,180.1	1,077.4	2,467.0	1,726.5	2,222.0	1,400.0
Greece	265.0	312.0	321.0	256.5	315.5	288.8	269.1	264.3	320.0	220.0
Italy	2,642.2	2,056.8	2,240.5	2,012.0	2,019.5	2,273.0	2,442.5	2,162.0	1,856.5	1,835.0
Netherlands	490.0	403.0	431.0	300.0	445.0	340.0	383.0	417.0	431.0	195.0
Spain 2/	860.4	1,012.3	969.5	988.1	828.6	970.9	844.8	747.3	620.8	430.0
United Kingdom	340.3	292.5	315.6	273.1	311.4	263.7	234.4	416.2	264.0	319.6
Total	9,602.3	7,245.1	8,436.9	7,348.6	8,330.0	7,482.0	8,937.2	7,958.7	7,884.4	5,660.3
OTHER EUROPE:										
Austria 2/	339.5	263.0	276.3	240.8	283.2	205.9	295.7	255.1	268.4	271.0
Hungary	1,278.0	1,140.6	1,088.2	953.6	1,252.9	1,064.4	1,130.8	959.0	930.0	950.0
Norway	43.7	50.6	47.4	63.7	32.5	46.4	52.0	69.0	50.4	40.0
Sweden	97.4	98.7	90.3	92.8	95.6	70.6	90.0	100.8	68.3	55.2
Switzerland 2/	209.0	134.7	188.7	148.6	189.3	169.0	435.5	217.9	312.5	136.2
Turkey	1,600.0	1,750.0	1,900.0	1,900.0	1,860.0	1,680.0	1,950.0	1,850.0	1,900.0	1,950.0
Yugoslavia	746.0	557.0	584.0	368.0	637.0	423.0	518.0	546.0	523.0	480.0
Total	4,313.6	3,994.6	4,174.9	3,767.5	4,350.5	3,659.3	4,472.0	3,997.7	4,052.5	3,882.4
Total Europe	13,915.8	11,239.8	12,611.7	11,116.1	12,680.5	11,141.3	13,409.2	11,956.4	11,936.9	9,542.7
ASIA:										
Japan	923.5	1,048.0	811.7	909.8	986.1	997.9	1,042.0	1,045.0	1,053.0	555.0
Taiwan	11.0	12.0	13.5	13.7	15.7	16.3	12.1	18.0	12.6	15.7
Total	934.5	1,060.0	825.2	923.5	1,001.8	1,014.2	1,054.1	1,063.0	1,065.6	570.7
Total Northern Hemisphere	19,406.5	16,887.4	18,133.3	16,550.9	18,264.1	18,149.3	19,728.8	18,620.1	18,426.7	15,782.2

CONTINUED

TABLE 16

APPLE PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric Tons)

	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92 1/
SOUTHERN HEMISPHERE 3/										
Argentina	817.0	872.0	922.4	593.9	1,078.0	924.5	1,029.5	1,050.0	980.0	N/A 4/
Australia	300.8	267.0	352.0	288.0	362.0	309.0	350.0	333.0	292.0	N/A
Chile	365.0	410.0	450.0	515.0	580.0	630.0	660.0	690.0	700.0	N/A
New Zealand	217.3	255.6	285.7	310.0	343.9	382.8	359.5	403.9	416.0	N/A
South Africa	519.0	513.1	557.0	516.7	470.2	526.3	534.2	557.2	543.8	N/A
Total Southern Hemisphere	2,219.1	2,317.7	2,567.1	2,223.6	2,834.1	2,772.6	2,933.1	3,034.1	2,931.8	N/A
TOTAL PRODUCTION	21,625.6	19,205.1	20,700.5	18,774.5	21,098.2	20,921.9	22,661.9	21,654.2	21,358.5	N/A

1/ Preliminary. 2/ Excludes some apples grown for processing. 3/ Southern Hemisphere season follows the Northern Hemisphere, thus the harvest occurs entirely in the second year of the split year shown.

4/ N/A = not available until January 1991.

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Production Estimates and Crop Assessment Division

TABLE 17

PEAR PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric Tons)

	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92 1/
NORTHERN HEMISPHERE										
NORTH AMERICA:										
Canada	30.7	28.7	24.4	28.2	23.7	27.6	23.3	21.3	16.4	15.0
Mexico	46.6	48.8	51.6	52.0	57.5	54.8	50.1	44.9	43.7	27.0
United States	727.5	701.8	642.5	675.5	696.0	851.4	781.0	831.7	874.3	800.2
Total	804.8	779.2	718.5	755.7	777.2	933.8	854.4	897.9	934.4	842.2
EUROPEAN COMMUNITY:										
Bel-Lux	96.9	101.7	72.3	78.5	80.7	91.5	84.0	87.2	62.2	62.8
Denmark	4.8	6.0	6.0	6.2	6.0	3.9	6.0	5.8	6.9	5.7
France	428.7	414.2	449.2	417.0	347.6	439.8	315.1	326.9	325.0	185.6
Germany	533.8	380.3	448.9	334.9	498.9	294.1	498.2	347.1	379.6	197.6
Greece	129.0	146.0	117.0	111.0	111.0	91.3	91.4	95.0	86.7	60.0
Italy	1,142.1	1,202.0	1,064.4	801.6	913.0	900.6	986.5	820.0	1,032.7	859.0
Netherlands	120.0	135.0	128.0	107.0	90.8	140.0	89.0	113.0	90.0	101.0
Spain	451.0	551.0	498.9	600.1	361.2	520.6	457.3	548.2	444.9	374.6
United Kingdom	40.2	54.0	48.1	50.7	46.7	63.4	31.7	43.6	36.7	42.8
Total	2,946.5	2,990.3	2,832.7	2,506.9	2,455.9	2,545.1	2,559.3	2,386.8	2,464.7	1,889.1
OTHER EUROPE:										
Austria	56.6	49.4	53.6	44.0	50.9	35.9	53.8	46.7	41.0	38.3
Norway	8.1	7.6	11.7	9.0	3.8	4.9	7.8	4.2	5.5	4.0
Sweden	11.1	12.0	12.5	8.6	8.8	9.4	11.3	10.8	10.9	8.4
Switzerland	34.0	25.2	27.2	21.6	21.9	19.8	23.5	79.5	63.9	59.8
Turkey	330.0	384.0	360.0	370.0	380.0	370.0	410.0	430.0	413.0	430.0
Yugoslavia	177.3	165.4	145.0	146.6	169.1	146.6	173.3	177.0	164.0	170.0
Total	617.1	643.5	610.0	599.7	634.5	586.5	679.6	748.2	698.3	710.5
Total Europe	3,563.6	3,633.8	3,442.7	3,106.7	3,090.4	3,131.6	3,238.9	3,135.0	3,163.0	2,599.6
ASIA:										
Japan	492.6	502.6	479.5	470.5	489.3	476.5	454.1	447.9	443.0	420.0
Total Northern Hemisphere	4,861.0	4,915.6	4,915.7	4,640.8	4,333.0	4,356.9	4,547.3	4,480.8	4,353.8	3,861.8

CONTINUED

TABLE 17

PEAR PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric Tons)

	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92 1/
SOUTHERN HEMISPHERE 3/										
Argentina	176.0	167.0	192.5	164.9	252.1	211.2	262.0	265.0	260.0	N/A 2/
Australia	119.0	122.0	138.0	143.0	146.0	163.0	147.0	152.0	157.0	N/A
Chile	50.0	66.0	60.0	78.0	84.0	95.0	119.0	139.0	155.0	N/A
New Zealand	6.9	13.2	12.8	13.5	14.2	15.5	12.7	12.6	12.3	N/A
South Africa	139.6	128.4	148.0	143.7	173.3	198.2	174.9	192.5	199.4	N/A
Total Southern Hemisphere	491.5	496.6	551.3	543.1	669.6	682.9	715.6	761.1	783.7	N/A
TOTAL PRODUCTION	5352.5	5412.2	5192.0	4875.9	5026.4	5224.8	5263.0	5241.9	5324.1	N/A

1/ Preliminary. 2/ N/A = not available until January 1991. 3/ Southern Hemisphere season follows the Northern Hemisphere, thus the harvest occurs entirely in the second year of the split year shown.

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TABLE 18

APRICOT PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric Tons)

	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991 1/
NORTHERN HEMISPHERE										
France	71.5	102.2	81.7	102.5	113.5	96.8	96.2	128.0	112.4	101.0
Greece	90.4	142.0	95.0	127.6	86.0	109.8	153.9	83.9	113.4	63.0
Italy	172.4	186.6	195.6	194.9	191.5	198.7	195.8	189.0	203.2	173.0
Spain	180.0	162.0	208.1	153.1	149.8	141.7	157.4	165.0	114.7	204.0
Turkey	205.0	245.0	250.0	202.0	350.0	250.0	360.0	449.0	300.0	430.0
United States	107.2	84.4	115.0	118.7	49.6	103.7	92.2	108.9	111.1	86.3
Yugoslavia	28.1	32.2	19.3	26.4	25.6	21.3	28.0	46.3	47.0	35.0
Total	854.6	954.4	964.7	925.2	966.0	922.1	1083.5	1170.1	1001.7	1092.3
SOUTHERN HEMISPHERE 2/										
Argentina	19.1	25.8	28.6	25.9	11.8	12.35	23.0	16.6	16.5	16.0
Australia	27.1	26.9	23.6	24.5	29.6	29.5	29.5	31.0	32.0	32.5
Chile	12.0	13.5	13.3	14.0	14.7	11.8	12.5	14.0	14.7	15.5
New Zealand	7.2	5.4	8.0	9.4	9.0	8.7	8.5	8.8	10.0	9.3
South Africa	26.1	23.5	40.6	25.5	40.5	41.9	44.2	43.0	60.8	47.7
Total	91.5	95.1	114.2	99.3	105.6	104.2	117.7	113.4	133.9	121.0
TOTAL PRODUCTION	946.1	1049.5	1078.9	1024.5	1071.6	1026.3	1201.1	1283.4	1135.6	1213.3

1/ Preliminary. 2/ Southern Hemisphere season follows the Northern Hemisphere, thus the harvest occurs entirely in the second year of the split year shown.

TABLE 19

CHERRY PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric Tons)

	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991 1/
NORTHERN HEMISPHERE										
Canada	10.8	15.0	15.8	16.0	8.4	15.4	12.3	13.5	9.2	10.0
France	123.2	97.9	119.0	100.8	91.8	101.2	77.4	99.0	72.0	44.0
Germany	298.4	272.7	295.4	248.8	249.4	250.9	232.8	205.9	259.3	112.5
Greece	24.3	24.4	29.0	23.2	38.8	33.9	35.0	35.8	41.7	23.0
Italy	169.0	159.1	158.6	157.0	139.6	158.4	144.0	136.5	108.8	105.1
Japan	15.4	24.1	15.0	23.3	16.7	18.8	18.4	14.5	16.0	15.4
Spain	72.0	74.0	78.0	80.0	66.9	68.7	42.9	64.7	42.0	73.8
Turkey	167.0	176.0	170.0	215.0	220.0	195.0	215.0	214.0	233.0	240.0
United States	283.1	234.5	288.1	250.0	226.6	357.9	276.1	295.3	236.9	181.3
Yugoslavia	155.0	188.3	160.0	181.7	157.0	180.8	200.8	220.0	182.2	130.0
Total	1,318.2	1,266.0	1,328.9	1,295.9	1,215.2	1,381.0	1,254.7	1,299.1	1,201.1	935.1
SOUTHERN HEMISPHERE 2/										
Australia	5.4	4.2	3.5	5.1	5.8	6.1	7.1	7.0	7.2	7.5
Chile	6.0	7.0	7.9	8.5	9.5	6.3	8.6	10.6	11.2	12.3
Total	11.4	11.2	11.4	13.6	15.3	12.4	15.7	17.6	18.4	19.8
TOTAL PRODUCTION	1,329.6	1,277.2	1,340.2	1,309.5	1,230.5	1,393.4	1,270.4	1,316.7	1,219.5	954.9

1/ Preliminary. 2/ Southern Hemisphere season follows the Northern Hemisphere, thus the harvest occurs entirely in the second year of the split year shown.

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TABLE 20

PEACH AND NECTARINE PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric Tons)

	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991 1/
NORTHERN HEMISPHERE										
Canada	34.3	38.8	37.0	42.2	33.2	44.9	44.1	39.5	49.1	43.0
France	413.6	471.4	478.8	488.0	473.1	487.9	451.5	546.0	501.4	416.1
Greece	476.0	484.0	520.0	532.5	512.1	546.8	614.6	641.0	760.0	700.0
Italy	1,569.3	1,639.9	1,554.4	1,419.5	1,436.0	1,542.0	1,476.1	1,682.0	1,767.0	1,630.0
Japan	227.5	236.9	215.6	205.4	219.2	212.3	202.9	180.2	189.8	193.3
Mexico	229.9	187.7	233.5	230.5	252.9	230.0	264.5	265.0	265.0	245.0
Spain	462.0	492.0	508.8	531.4	527.2	604.0	649.4	765.9	585.4	640.0
Turkey	265.0	270.0	235.0	200.0	275.0	235.0	328.0	317.0	350.0	360.0
United States	1,198.2	1,009.4	1,372.7	1,164.9	1,202.3	1,253.5	1,367.2	1,240.5	1,191.7	1,344.9
Yugoslavia	96.7	101.6	92.6	79.4	89.5	77.9	77.0	91.2	65.0	80.0
Total	4,972.4	4,931.7	5,248.4	4,893.7	5,020.6	5,234.3	5,475.3	5,768.3	5,724.3	5,652.3
SOUTHERN HEMISPHERE 2/										
Argentina	182.0	256.0	241.0	287.4	209.0	181.1	260.0	260.0	249.5	200.0
Australia	69.5	68.4	53.5	65.3	68.4	73.0	75.0	63.4	67.6	71.6
Chile	104.0	130.0	142.0	155.0	148.9	147.0	151.4	162.4	175.0	185.0
New Zealand	30.0	23.6	27.3	25.0	27.0	28.0	28.5	24.6	26.4	25.9
South Africa	147.7	146.7	133.3	120.8	146.4	148.9	145.7	139.2	138.5	139.6
Total	533.1	624.7	597.1	653.5	599.7	578.0	660.6	649.6	657.0	622.1
TOTAL PRODUCTION	5,505.5	5,556.4	5,845.5	5,547.3	5,620.3	5,812.3	6,135.9	6,417.9	6,381.4	6,274.4

1/ Preliminary. 2/ Southern Hemisphere season follows the Northern Hemisphere, thus the harvest occurs entirely in the second year of the split year shown.

TABLE 21

TABLE GRAPE PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric Tons)

	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991 1/
NORTHERN HEMISPHERE										
France	160.8	127.6	127.9	153.9	135.0	123.8	128.6	125.0	128.0	75.2
Greece	239.0	256.0	317.8	345.9	311.0	296.6	318.9	329.3	297.3	320.0
Italy	1,377.8	1,865.0	1,550.0	1,720.0	1,748.6	1,619.5	1,427.4	1,490.0	1,212.5	1,164.0
Japan	303.8	284.9	285.3	280.5	272.6	272.0	259.5	275.1	276.1	270.0
Mexico	192.0	243.8	264.6	278.3	279.4	324.2	335.6	345.0	342.0	365.0
Spain	539.0	508.0	553.9	561.3	555.0	514.6	414.0	423.8	487.9	439.8
United States	640.8	609.0	614.1	708.9	707.1	649.8	754.2	714.2	770.2	N/A
Yugoslavia	267.0	242.0	212.0	144.0	232.5	198.5	173.3	153.3	166.4	172.5
Total	3,720.2	4,136.3	3,925.5	4,192.7	4,241.2	3,999.0	3,811.4	3,855.7	3,680.3	N/A
SOUTHERN HEMISPHERE 2/										
Argentina	120.0	117.0	91.0	100.0	92.0	110.0	120.0	140.0	146.0	150.0
Chile	152.0	200.0	225.0	295.0	317.5	397.0	490.0	540.0	660.0	650.0
South Africa	62.1	62.4	72.0	79.1	61.3	95.6	87.0	101.8	113.1	115.1
Total	334.1	379.4	388.0	474.1	470.8	602.6	697.0	781.8	919.1	915.1
TOTAL PRODUCTION	4,054.3	4,515.7	4,313.6	4,666.8	4,712.0	4,601.6	4,508.4	4,637.5	4,599.4	N/A

1/ Preliminary. 2/ Southern Hemisphere season follows the Northern Hemisphere, thus the harvest occurs entirely in the second year of the split year shown.

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HONEY PRODUCTION IN SELECTED COUNTRIES

Honey production for 1991 in selected producing countries is forecast at 753,200 tons 1/, up 18,629 tons or 2 percent from 1990. The surveyed countries in 1991 accounted for approximately 60 percent of the worlds total.

Canadian production for 1990 is forecast at 35,000 tons, up 6 percent from last year, but virtually unchanged from the 1985-89 average. In the Prairie Provinces, which account for about 70 percent of Canadian production, weather and crop conditions at the beginning of the 1991 season were excellent and many areas in Saskatchewan and Alberta predicted a bumper honey crop.

With the exception of short periods of poor flying weather for bees, moisture and bee foraging conditions were good to excellent. July turned very hot and dry in the prairie region, especially in southern Alberta, and honey crop prospects were reduced somewhat as nectar sources dried up. In Ontario, prospects are for an average honey crop. Many areas reported near-record sunshine hours for the months of May and June, although dry conditions during July affected important floral periods for bees, lowering total honey output potential.

A combination of low honey prices in the late 1980's and the animal health ban on imports of live bees from the United States sharply reduced total bee colonies in Canada, which bottomed out at near 548,000 colonies in 1989. For 1990 and 1991, the inventory of colonies has shown small growth. The number of colonies is expected to climb to 565,000 in 1991. The growth reflects, in part, renewed interest in bee-breeding following the import ban on U.S. bees, improved profitability through higher market prices, and successive payouts under the national tripartite stabilization plan for honey.

Mexico's honey outturn for 1991 is forecast at 52,700 tons, 3 percent more than the previous year. Abundant flowering is reported in honey producing areas of northern and central Mexico as a result of adequate rainfall. Production in Yucatan, the main honey-producing state, was lower than expected during the peak harvest season (January-June), mainly due to the impact of Africanized bees. Beekeeping specialists continue to report the adverse effect of Africanized bees on honey production in Yucatan.

Specialists agree that the Mexican beekeeping industry will not be devastated by the Africanized strain of bee. "The Program to Control the Africanized Bee" is now financed mainly by the Mexican Government. The Government is also sponsoring promotional campaigns to expand honey consumption. Relatively small and traditional honey producers are most affected by Africanization, due to their lack of access to economic resources and Government programs. Medium and large producers continue to have access to production and export credits, in U.S. dollars, at the prime rate from the National Bank of Foreign Trade. This has resulted in a gradual modernization of the domestic beekeeping industry.

1/ The 1991 estimate includes a unified Germany while the 1990 total reflects production from West Germany only. Official sources estimate East German honey production at 9,000 tons in 1990.

U.S. honey production for 1991 is forecast at 91,000 tons, 2 percent above last year's outturn of 88,920 tons.

Argentina's 1991 (October 1990 through March 1991) honey output is forecast at 44,000 tons, a decline of 2,000 tons or 4 percent from last year's revised estimate. Honey production in Argentina is mainly centered in two provinces; 60 percent of total honey output is produced in Buenos Aires, 20 percent in Santa Fe, 5 percent each in Cordoba and Entre Rios, and the remaining 10 percent is distributed over the rest of the country. The average annual yield of honey per hive during normal weather is 60 kilograms in Buenos Aires and Santa Fe provinces, 45-50 kilograms in Entre Rios and Cordoba, and 40 kilograms elsewhere.

Brazil's 1991 honey production is forecast at 35,000 tons, up 2,700 tons from the previous year. Most of the increase is attributed to favorable weather, providing good eucalyptus flowering in the center-south. The average annual increase in the number of colonies during 1985-90 is estimated at 67,000, which reflects the larger, unexplored potential floral sources in the country. In the long-term, honey producers are concerned about the fast rate of deforestation of eucalyptus areas, which has already reduced floral sources in some states. In the short-term, potential increases in crop area will come from citrus and from wild flora sources in the south. Producers report that yields have improved in the south among the most modern honey producers, who are active members of apiculture associations. These producers reached an average of 65 kilograms per hive in 1990, against the low national average of 15 kilograms.

In the Soviet Union, the world's largest honey producer, the 1991 harvest is forecast at 240,000 tons, up 2 percent or 3,900 tons from the 1990 crop. Honey production has been revised downward reflecting recently published data from the USSR State Committee for Statistics. According to these data, honey production had been increasing at a slower pace than previously estimated. Most Soviet honey is produced by the private sector, thus constraining product marketing domestically and overseas. Honey production remains labor intensive, although there have been some trends toward mechanization. Given the shortage of honey in State-run stores and continued demand, coupled with new incentives promoting individual small farm holdings, honey production should continue to increase steadily.

Over the past year, many Soviet Republics have implemented legislation pertaining to land reform and granted many individuals the right to lease and own land. The average size of many plots is roughly 10 hectares, too small for large-scale production but suitable for truck-farming and beekeeping. Given the tradition of beekeeping in the Soviet Union and its popularity, the likelihood exists that beekeeping will continue to increase in the private sector. Several problems may limit future expansion in the honey sector, including a lack of building materials for apiaries, inadequate feed supplies, and damage from pesticides and herbicides.

China, the second largest producer in the world, is expecting a honey crop of 190,000 tons in 1991, 3,000 tons less than last year's revised estimate and 14,000 tons below the record 1987 crop. Intermittent cool weather in the major rapeseed production regions prevented bees from gathering flowers for a considerable period.

Severe flooding in northeast China, at the peak of the production season, kept some bees in their hives and destroyed many hives. Hives were also destroyed by the disastrous floods which struck the Yangtze River Valley in July. Significant changes in China's honey trade policy and quality problems have dampened farmers' enthusiasm for producing honey. Despite these developments, production should resume its upward momentum in 1992. The Government's 5-year plan (1991-1995) calls for bee colony numbers to rise to 8 million and honey production to 250,000 tons by 1995. However, beekeeping is a sideline occupation and does not have specific policy measures to ensure the realization of this target. The achievement of target goals will depend largely on international and domestic market demand. A 1980 base-line survey conducted by apiculture experts reported resources sufficient to sustain 10 million colonies and an annual production of 300,000 tons.

Australian honey output for 1991 (July 1990 to June 1991) is forecast at 26,200 tons, unchanged from last year's revised estimate. Prospects for 1991 are mixed due to good rain and mild weather in some producing areas and colder weather in other regions, especially the important tableland areas of New South Wales (NSW). Long range weather forecasts indicate that Australia could experience a dry spring which could lead to poor flowering and pollen producing conditions and a subsequently smaller 1992 honey crop.

The Australian apiculture industry is involved in an emotional battle to save the plant called Pattersons Curse (Echium Plantagineum). It is one of the most important floral resources in NSW, which produces 42 percent of the country's honey. Attempts have been made to find a biological way to control the plant which many consider a noxious weed. Industry sources believe that biological control of Pattersons Curse will be slow and that it is too early to judge its effectiveness. They are confident that biological control will only limit the size of the floral area; not eliminate it entirely.

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TABLE 22

HONEY PRODUCTION, SELECTED COUNTRIES
==========(METRIC TONS)==========

COUNTRY AND REGION	1987	1988	1989	1990	1991
NORTH AMERICA					
Canada	39,776	37,105	27,815	33,078	35,000
Mexico	47,850	46,140	48,530	51,000	52,700
United States	102,875	97,114	80,266	88,920	91,000 1/
TOTAL	190,501	180,359	156,611	172,998	178,700
SOUTH AMERICA					
Argentina	44,000	46,000	40,000	46,000	44,000
Brazil	30,500	36,000	34,000	32,300	35,000
TOTAL	74,500	82,000	74,000	78,300	79,000
EUROPE					
Germany	16,000	18,000	29,000	23,000	35,000
USSR	219,245	243,000	225,000	236,219	240,000
TOTAL	235,245	261,000	254,000	259,219	275,000
ASIA					
CHINA	204,000	156,000	189,000	193,000	190,000
Japan	6,023	4,870	5,343	4,854	4,300
TOTAL	210,023	160,870	194,343	197,854	194,300
OCEANIA					
Australia	28,000	27,622	26,198	26,200	26,200
Total	738,269	711,851	705,152	734,571	753,200

1/ First estimate based on objective survey is expected to be released in February 1992.

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COCOA PRODUCTION IN SELECTED COUNTRIES

Cocoa bean production in 1991/92 (October-September) for selected countries is estimated at 2.35 million tons, down 4 percent from last year's revised outturn of 2.45 and 5 percent less than the 2.47 million-ton-record set in 1988/89. The largest regional decreases are expected to occur in Africa and South America, down 70,100 tons and 53,100 tons, respectively, from the 1990/91 crop. The largest regional increase over last year occurred in Asia, up 20,100 tons.

In Africa, 1991/92 cocoa production is forecast at 1.30 million tons, down 70,100 tons or 5 percent from 1990/91. Cocoa outturn in this region has fallen 175,000 tons since the 1988/89 record harvest. In Cote d'Ivoire, the world's largest producer, the forecast of 725,000 tons is down 7 percent from the revised 1990/91 estimate and 15 percent below the record outturn of 849,000 tons in 1988/89. The decline in the current year is attributed to excessive rainfall during the flowering period and poor farm management practices. The rains started in January and were abundant, though irregular, through March. The rains became more regular and intensive from April through June but diminished from mid-July and stopped in August. The early rains caused tree flushing to start in earnest. However, tree flowering and pod formation coincided with the period of intensive rain, causing flower fall. Yields in 1991/92 are projected to decline because of a rising incidence of capsid attacks, with the most affected areas in the southwest. Capsid attacks can result in up to 20 percent harvest loss.

Farm management problems in Cote d'Ivoire are increasing because of low producer prices. Low prices also hinder area expansion. The Government's policy is to maintain the crop area at current levels by discouraging further area expansion. Farmers are supplied with free hybrid seeds for re-planting and increasing tree numbers on existing area. Farmers also use free seed to expand crop area. In 1990, an equivalent of 7,500 hectares of hybrid seeds were furnished to farmers. The projection for 1991 is for an equivalent of 14,000 hectares.

In Ghana, the forecast for 1991/92 is 280,000 tons, down 5 percent from last season and 7 percent less than the relatively large crop of 1988/89. A new strain of black pod disease affected limited areas and has increased the need for fungicides. However, elimination of subsidies on insecticides and fungicides in August 1990 led to a sharp drop in usage this year. The Government instituted a credit scheme in mid-1991 for small holders to purchase inputs. The credit availability resulted in the greater use of insecticides and some fungicides shortly after the announcement. Unusually heavy rains, which began in January 1991, continued through September 1991.

In Nigeria, the forecast for 1991/92 is 165,000 tons, slightly above the previous season's outturn. Persistent rainfall throughout the season continued through August 1991, the usual month for a break in the rains.

The Nigerian farmer continues to enjoy an adequate farm-gate price, in spite of low international prices. In view of constant devaluation of the Naira, few chemicals were imported and there has been a gradual drop of Government support to local farmers for the purchase of inputs.

South America's 1991/92 cocoa production is forecast at 506,000 tons, down 9 percent from last year. The forecast for Brazil, the world's second largest producer, is 335,000 tons, down 11 percent (40,000 tons) from last year. The Bahia main crop is forecast at 126,000 tons; the Temporao and other production is forecast at 209,000 tons. The unusually cold and humid winter months (June through August) favored outbreaks of pod rot and witch broom fungus. This resulted in substantial losses to the 1991 (May-September) Bahia mid-crop (Temporao) and losses are also expected to extend into the upcoming 1991/92 Bahia main crop (October 91-April 92). Grower prices continued at a 30-year low level until August 1991, when prospects of a short 1991 Bahia Temporao crop were confirmed.

Brazil's low domestic cocoa prices and increasing costs of fertilizers and pesticides do not allow optimal plantation management, especially the control of pod rot and other fungal outbreaks. Planted cocoa area has continued unchanged at about 630,000 hectares since the mid-1980's, when the cocoa production expansion program was completed. That program raised total cocoa planted area from 400,000 hectares in the late 1970's to the current level, raising the country's cocoa production from 200,000 tons to over 380,000 tons.

Brazil's current economic problems have caused significant reductions in the Cocoa Research and Extension Institution's (CEPLAC) budget. This has caused delays in implementing the 5-year program designed to improve both the productivity and quality of Brazilian cocoa in order to maintain its competitiveness in the world market.

North and Central America and Caribbean cocoa production for 1991/92 is forecast at 105,000 tons, 7 percent more (6,900 tons) than a year ago. Virtually all of the increase comes from the Dominican Republic, forecast at 47,000 tons, 7,000 more than last year. Damaging weather in this region in September/October 1990 gave way to semi-drought conditions during the winter-spring period. The prevailing drier weather allowed many trees time to overcome fungal infestation brought on by excessive wetness. Yields rose considerably as a result of the later, drier growing conditions.

Asia/Oceania cocoa production for 1991/92 is forecast at 438,000 tons, an increase of 5 percent over last year. In Malaysia, the forecast is a record 245,000 tons, up 7 percent from last year.

Franklin Hokana (202) 720-0875

TABLE 23

COCOA BEAN PRODUCTION, SELECTED COUNTRIES 1/
(1,000 Metric Tons)

	Average 1982/86	1987/88	1988/89	1989/90	1990/91	1991/92
Costa Rica	3.7	3.9	4.1	4.6	3.5	3.3
Cuba	2.3	2.1	2.1	2.1	2.1	2.1
Dominican Republic	41.2	50.0	44.3	57.0	40.0	47.0
Grenada	2.0	2.0	2.0	2.0	2.0	2.0
Guatemala	1.8	2.0	2.0	2.0	2.0	2.0
Haiti	3.3	3.0	3.0	3.0	3.0	3.0
Honduras	1.1	1.9	2.1	2.2	2.2	2.2
Jamaica	2.4	2.4	1.5	1.5	2.0	2.0
Mexico	38.3	47.5	41.0	38.5	38.9	39.0
Nicaragua	0.2	0.2	0.2	0.2	0.2	0.2
Panama	0.6	0.5	0.5	0.5	0.5	0.5
Trinidad and Tobago	1.8	1.8	1.4	1.5	1.5	1.5
Other 2/	0.2	0.3	0.3	0.3	0.3	0.3
NORTH AND CENTRAL AMERICA AND CARIBBEAN	98.9	117.6	104.5	115.4	98.2	105.0
Bolivia	2.6	2.5	2.5	2.5	2.5	2.5
Brazil	351.6	400	334	356	375	335
Colombia	41.3	53.8	56.3	58	60	61.5
Ecuador	87.5	76	82	100	95	80
Peru	9.5	10	10	10	10	10
Surinam	0.1	0.1	0.1	0.1	0.1	0.1
Venezuela	12.7	12.5	11.5	14.4	16.6	17.0
SOUTH AMERICA	505.3	554.9	496.4	541.0	559.2	506.1
Angola	0.2	0.2	0.2	0.2	0.2	0.2
Cameroon	114.8	133.0	124.0	117.0	100.0	95.0
Comoro Islands	0.1	0.1	0.1	0.1	0.1	0.1
Congo	1.7	1.2	1.6	1.0	1.0	1.0
Cote d' Ivoire 3/	471.3	673.9	848.9	710.0	780.0	725.0
Equatorial Guinea	8.8	8.3	6.6	7.5	7.5	7.5
Gabon	2.1	1.6	1.9	1.6	1.6	1.5
Ghana	191.4	187.0	301.0	295.0	295.0	280.0
Liberia	5.5	3.3	3.0	3.0	2.0	2.0
Madagascar	2.2	2.2	2.8	2.5	2.5	2.5
Nigeria 4/	153.6	145.0	160.0	155.0	160.0	165.0
Sao Tome and Principe	4.1	4.7	4.3	2.8	4.0	4.0
Sierra Leone	9.6	9.0	7.6	5.5	6.0	5.0
Tanzania	1.2	1.6	1.9	2.0	2.0	2.0
Togo 3/	12.3	12.0	10.0	6.5	7.0	8.0
Uganda	0.2	0.2	0.3	0.2	0.3	0.3
Zaire	4.6	5.7	4.6	5.0	5.0	5.0
AFRICA	983.6	1189.0	1478.8	1314.9	1374.2	1304.1
Fiji	0.2	0.2	0.3	0.3	0.3	0.3
India	4.9	6.0	6.0	6.0	6.0	6.0
Indonesia	25.3	70.0	98.0	120.0	125.0	130.0
Malaysia	89.8	227.0	225.0	240.0	230.0	245.0
Papua New Guinea	29.8	35.0	48.0	41.0	40.0	40.0
Philippines	5.8	7.2	7.8	9.0	9.0	9.0
Solomon Islands	1.1	2.5	2.6	3.3	3.9	4.0
Sri Lanka	1.5	1.5	1.5	1.5	1.5	1.5
Vanuatu/New Hebrides	0.9	0.8	1.4	2.2	2.0	2.0
Western Samoa	1.0	0.7	0.5	0.5	0.5	0.5
ASIA AND OCEANIA	160.3	350.9	391.1	423.8	418.2	438.3
WORLD	1748.1	2212.4	2470.8	2395.1	2449.8	2353.5

1/Estimates refer to an October-September crop year. 2/Includes Dominica, St. Lucia, Guadeloupe, Belize and Martinique. 3/ Includes some cocoa marketed from Ghana. 4/ Includes cocoa marketed through Benin.

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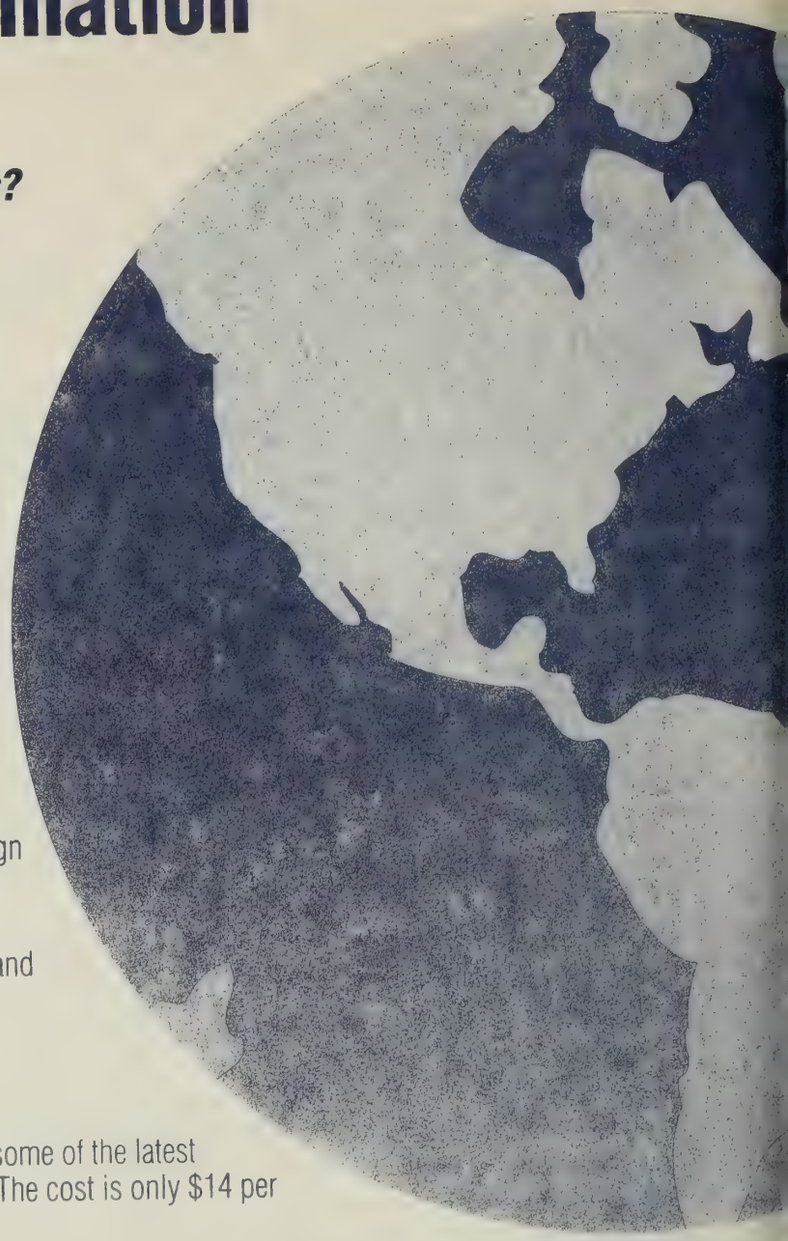

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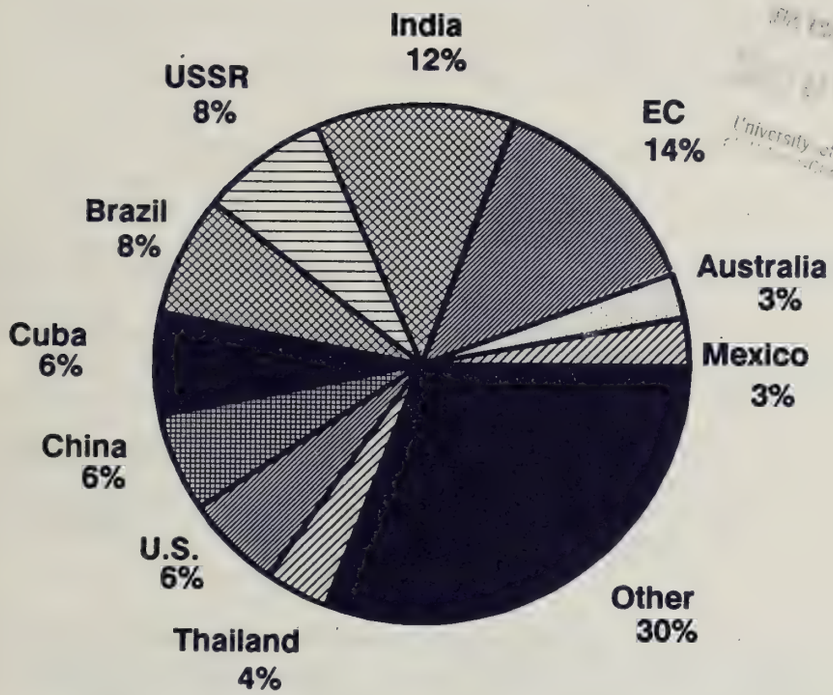
WAP 11-91
November 1991

World Agricultural Production

World Centrifugal Sugar Production

Top Producers



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Production Articles This Month...

World Sugar
World Peanuts
World Pistachios
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World Dried Prunes
China Livestock
World Cotton
World Raisins/Sultanas
Latin American Forestry
Oceania Forestry
World Dairy

Approved by the World Agricultural Outlook Board - USDA

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-260), November 12, 1991.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 720-0888 or by FAX (202) 720-8880.

****
* The next issue of World Agricultural Production will be released at 3 p.m. *
* eastern time on December 12, 1991. *
****

CONVERSION TABLE

Metric Tons to Bushels		Metric Tons to 480-lb. Bales	
		Cotton	= MT*4.592917
Wheat & Soybeans	= MT*36.7437		
Corn, Sorghum, Rye	= MT*39.36825		
Barley	= MT*45.929625		
Oats	= MT*68.894438	Metric Tons to Hundredweight	
		Rice	=MT*22.04622
1 hectare	= 2.471044 acres		
1 kilogram	= 2.204622 pounds		

NOTE: BEGINNING WITH THE MAY EDITION, THIS CIRCULAR SERIES COMBINES DATA FOR THE TERRITORIES FORMERLY KNOWN AS EAST GERMANY (GDR) AND WEST GERMANY (FRG) UNDER THE HEADING GERMANY. LIKEWISE, DATA FOR THE TERRITORY FORMERLY CALLED EAST GERMANY (GDR) ARE INCLUDED IN AGGREGATES FOR THE EUROPEAN COMMUNITY (EC-12) AND EXCLUDED FROM AGGREGATES FOR EASTERN EUROPE. BECAUSE OF THIS, DATA FOR "GERMANY", EASTERN EUROPE, AND THE EUROPEAN COMMUNITY (EC-12) ARE NOT COMPARABLE WITH DATA PUBLISHED IN PRIOR EDITIONS OF THIS CIRCULAR SERIES AND MAY NOT BE COMPARABLE WITH SUCH ESTIMATES FOUND IN OTHER PUBLICATIONS OF THE U.S. DEPARTMENT OF AGRICULTURE.

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PRODUCTION HIGHLIGHTS FOR 1991/92

November 1991

WHEAT: World production for 1991/92 is estimated at 547.4 million tons, down 2.9 million, or less than 1 percent from last month and down 8 percent from last year. Total foreign production is estimated at 493.5 million tons, down 2.9 million or 1 percent below last month and down 5 percent from last year. Country highlights are as follows:

- **United States** — Production is estimated at 53.9 million tons, unchanged from last month and down 28 percent from last year.

- **Soviet Union** — Production is estimated at 78.0 million tons, down 5.0 million or 6 percent from last month and down 28 percent from last year. The decrease is based on official harvest progress reports.

- **Australia** — Production is estimated at 10.0 million tons, down 1.0 million or 9 percent from last month and down 34 percent from last year. Yields are estimated down 9 percent owing to continued dry conditions, especially in Queensland and New South Wales.

- **China** — Production is estimated at 96.0 million tons, up 2.0 million or 2 percent from last month, but down 2 percent from last year's record crop. Severe flooding during the winter wheat harvest hurt production in central China, but the losses were more than offset by increases in the North China Plain and Sichuan.

- **Eastern Europe** — Production is estimated at 40.7 million tons, up 1.0 million or 3 percent from last month, but down 1 percent from last year. The increase is due to larger than expected production in Bulgaria.

- **Other N. Africa** — Production is estimated at 8.3 million tons, up 0.2 million or 3 percent from last month, and up 47 percent from 1990/91. Timely rainfall in the major growing areas of Algeria improved yields and increased production to near record levels.

- **Mexico** — Production is estimated at 3.7 million tons, up 0.2 million or 6 percent from last month, but down 5 percent from last year. Increased yields for both spring and winter wheat improved production prospects. Spring wheat was aided by the plentiful moisture in the Bajio region.

COARSE GRAINS: World production for 1991/92 is estimated at 801.5 million tons, up 1.2 million, a marginal increase from last month, but down 4 percent from last year. Total foreign production is estimated at 582.8 million tons, up 0.7 million, or less than 1 percent from last month, but down 3 percent from last year. Country highlights are as follows:

- **United States** — Production is estimated at 218.7 million tons, up 0.5 million, a slight increase from last month, but down 5 percent from last year. The increase is due to higher forecast yields for corn and sorghum.

- **China** — Production is estimated at 106.6 million tons, up 3.0 million or 3 percent from last month, but down 6 percent from last year's record crop. The revision is due to a 3 million ton increase in estimated corn production based on area information from official Chinese sources. In addition the crop was aided by good maturing and harvesting weather in the Northeast and the North China Plain.

- **Mexico** — Production is estimated at 18.0 million tons, up 1.7 million or 10 percent from last month, but down 2 percent from last year. Larger estimated harvested area for corn and better than average yields increased the corn production outlook, especially in the Bajio region.

- **Algeria** — Production is estimated at 1.6 million tons, up 0.5 million or 39 percent from last month and up 91 percent from last year. Abundant and well distributed rainfall led to record coarse grain production. Record yields more than doubled barley and oat production from last year's low levels.

- **Eastern Europe** — Production is estimated at 61.5 million tons, up 0.4 million or 1 percent from last month's estimate, and up 18 percent from last year's drought-reduced harvest. The increase is due to greater estimated production of Bulgarian corn and barley.

- **Argentina** — Production is estimated at 10.5 million tons, up 0.3 million or 3 percent from last month, but down 6 percent from last year. The increase is due to larger expected harvested area for sorghum and near average yields.

- **Venezuela** — Production is estimated at 1.8 million tons, up 0.2 million tons or 13 percent from last month, and up 16 percent from last year. Sorghum area increased due to higher domestic prices, and beneficial rains increased sorghum yield potential.

- **Soviet Union** — Production is estimated at 85.5 million tons, down 5.0 million or 6 percent from last month and down 25 percent from last year. The decrease is based on official harvest progress reports.

- **Australia** — Production is estimated at 6.9 million tons, down 0.4 million or 6 percent from last month, but up 4 percent from last year. The reduction is owing to the affects of drought on barley in northeastern growing areas. Strong barley production prospects are still forecast for the primary growing regions of South Australia, Victoria, and Western Australia.

RICE (MILLED-BASIS): World production for 1991/92 is estimated at 345.6 million tons, up 1.7 million or less than 1 percent from last month, but down 2 percent from last year's record crop. Total foreign production in 1991/92 is estimated at 340.6 million tons, up 1.7 million or slightly above last month, but down 6.6 million or 2 percent from 1990/91. Country highlights are as follows:

- **United States** — Production is estimated at 5.0 million tons, up 1 percent from last month, but down marginally from last year.

- **China** — Production is estimated at 129.5 million tons, up 2.1 million or 2 percent from last month, but down 2 percent from last year. Although the early rice crop was hurt by flooding in central China and drought in southern China this summer, the single and late rice crop benefited from warm and dry weather during late summer and autumn.

- **Peru** — Production is estimated at 0.6 million tons, up 0.1 million tons or 24 percent from last month, but down 7 percent from last year. The increase is due to larger than expected area primarily resulting from rice producers' ability to obtain financing, despite the government's tight credit policy.

- **South Korea** — Production is estimated at 5.3 million tons, down 0.4 million or 6 percent from last month and down 5 percent from last year. The reduction is based on lower estimated yield due to unfavorably wet and cloudy weather this summer and a decline in the area of high-yield "tongil" (indica) rice.

- **Indonesia** — Production is estimated at 28.7 million tons, down 0.2 million or 1 percent from last month and down 2 percent from last year. The decrease is the result of continuing drought in Java.

OILSEEDS: Total world oilseeds production during 1991/92 is forecast at a record 222.4 million tons, up slightly from last month and up 2 percent from 1990/91. Foreign production during 1991/92 is forecast to be a record 158.7 million tons, down 0.9 million or 1 percent from last month, but up 1 percent from last year. Total oilseed production in the United States is forecast at 63.7 million tons, up 1.0 million or 2 percent from last month and up 5 percent from last year.

* **Soybeans:** World production for 1991/92 is forecast at 105.3 million tons, down slightly from last month, but up 2 percent from last year. Total foreign soybean output is forecast at 51.9 million tons, down 0.8 million or 2 percent from last month and down 3 percent from 1990/91. Country highlights are as follows:

  - **United States** — Production is estimated at 53.4 million tons, up 0.8 million or 1 percent from last month and up 2 percent from last year. The National Agricultural Statistics Service, USDA, increased yield projections from last month, but held expected harvested area at 23.7 million hectares, up 4 percent from 1990/91.

  - **China** — Production is estimated at 10.0 million tons, down 0.8 million or 7 percent from last month and down 9 percent from last year. Farmers decreased area by an estimated 5 percent due to lower economic returns for soybeans relative to other crops. Expected yields also were reduced as a result of flooding in the Northeast and Yangtze River valley and drought in parts of Northern China.

  - **EC-12** — Production is estimated at 1.7 million tons, down 0.1 million or 6 percent from last month and down 21 percent from last year. In Italy, lower estimated area and yield reduced production.

* **Cottonseed:** World production for 1991/92 is forecast at 34.9 million tons, up 0.2 million or 1 percent from last month and up 4 percent from last year. Total foreign production is forecast at 28.5 million tons, up marginally from last month and up 1 percent from last year. Country highlights are as follows:

  - **United States** — Production is estimated at 6.4 million tons, up 0.2 million or 3 percent from last month and up 18 percent from 1990/91. Official estimates by the National Agricultural Statistics Service this month increased expected average yield and pegged harvested area at 5.5 million hectares, up 15 percent from last year.

* **Peanuts:** World production for 1991/92 is forecast at 23.5 million tons, up 0.1 million or less than 1 percent from last month and up 3 percent from 1990/91. Total foreign production is forecast at 21.3 million tons, up slightly from last month and last year. Country highlights are as follows:

  - **United States** — Production is estimated at a record 2.2 million tons, up marginally from last month and up 37 percent from 1990/91. The National Agricultural Statistics Service expects average yield to recover from last year's level and pegs harvested area at 795,000 hectares, up nearly 9 percent from 1990/91.

  - **China** — Production is estimated at 6.1 million tons, up 0.1 million or 2 percent from last month, but down 4 percent from last year. Very good summer and autumn weather in the most important peanut growing province of Shandong has led to higher estimated yield.

* **Sunflowerseed:** World production for 1991/92 is forecast at 21.4 million tons, down slightly from last month and down 4 percent from 1990/91. Total foreign production is forecast at 19.9 million tons, down slightly from last month and down 7 percent from last year. Country highlights are as follows:

  - **United States** — Production is estimated at 1.5 million tons, unchanged from last month, but up 45 percent from last year. Yield estimates 6 percent above 1990/91 are based on this season's favorable growing conditions. Harvested area is estimated at 1,025 thousand hectares, up 37 percent from 1990/91.

  - **EC-12** — Production is estimated at 4.0 million tons, down 0.1 million or 3 percent from last month and down 3 percent from last year. Lower than anticipated yields in France reduced output.

* **Rapeseed:** World production for 1991/92 is forecast at a record 27.2 million tons, down marginally from last month, but up 7 percent from last year. Total foreign production is forecast at 27.1 million tons, down marginally from last month, but up 7 percent from last year. Country highlights are as follows:

  - **United States** — Production is estimated at 105,000 tons, unchanged from last month, but nearly double that of last year. Area and production data for 1987/88 through the initial 1991/92 estimate, are estimates from the Inter-agency Oilseeds Committee and the World Agricultural Outlook Board. The National Agricultural Statistics Service, USDA, is expected to announce its U.S. rapeseed area estimates in January 1992.

* **Flaxseed:** World production for 1991/92 is forecast at 2.0 million tons, unchanged last month, but down 12 percent from last year. While production in the United States is small, this year's output is expected to increase by 18 percent over last year, to 114,000 tons. Total foreign production is pegged at 1.9 million tons, down 13 percent from 1990/91. There were no significant country changes this month.

* **Copra:** World production for 1991/92 is forecast at 4.6 million tons, down 0.1 million or 2 percent from last month and down 3 percent from last year. Copra production reached a record 5.3 million tons in 1985/86. Country highlights are as follows:

o **Indonesia** — Production is estimated at 1.3 million tons, down 0.1 million or 9 percent from last month and down 2 percent from last year. The lingering drought, especially in North Salawesi, cut yield estimates.

* **Palm Kernels:** World production for 1991/92 is forecast at a record 3.6 million tons, unchanged from last month, but up 9 percent from last year. There were no country changes this month.

* **Palm Oil:** World production for 1991/92 is forecast at a record 11.9 million tons, unchanged from last month, but up 8 percent from last year. There were no country changes this month.

COTTON: World cotton production in 1991/92 is estimated at a record 91.6 million bales. This estimate is up 0.9 million bales or slightly less than 1 percent from last month and up 4.6 million bales or 5 percent from 1990/91 and up from the previous record of 89 million bales harvested in 1984/85. Total foreign production is estimated at 73.4 million bales, up 0.3 million bales or less than 1 percent from last month and is a gain of 3 percent over 1990/91 and second only to the 1984/85 record crop of 76 million bales. Country highlights are as follows:

o **United States** — Production is estimated at 18.2 million bales, up 0.6 million or 3 percent from last month and a gain of 18 percent from last year. If realized, this will be the largest crop since 1937/38 when output hit 18.9 million bales. Mostly clear weather has favored cotton quality and harvesting across the Texas Plains, the southwest, and the southeast.

o **Argentina** — Production is estimated at a record 1.5 million bales, up 0.2 million or 15 percent from last month, and up 7 percent from last year. Cotton is the most profitable crop in the northern Argentine provinces of Chaco and Formosa. Early favorable weather has improved sowing conditions in these provinces.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	1991/92	1989/90	1990/91	Oct.	Nov.	1989/90	1990/91	Oct.	Nov.
	--Million Acres--			--Million Acres--			--Bushels per Acre--				--Million Bushels--			
All Wheat	76.6	77.2	69.9	62.2	69.3	57.7	32.7	39.5	34.3	34.3	2,037	2,736	1,981	1,981
Winter	55.1	56.9	51.0	41.5	49.9	39.4	35.0	40.7	34.8	34.8	1,455	2,031	1,372	1,372
Other	21.5	20.3	18.9	20.7	19.4	18.3	28.1	36.4	33.3	33.3	582	706	609	609
Rye	2.0	1.6	1.7	0.5	0.4	0.4	28.2	27.1	24.6	24.6	14	10	10	10
Soybeans	60.8	57.8	59.8	59.5	56.5	58.6	32.3	34.1	33.0	33.5	1,924	1,926	1,934	1,962
Corn	72.2	74.2	75.9	64.7	67.0	68.7	116.3	118.5	108.8	108.9	7,525	7,933	7,479	7,486
Sorghum	12.6	10.5	11.0	11.1	9.1	9.7	55.4	62.9	58.2	59.4	615	571	567	578
Barley	9.1	8.2	8.9	8.3	7.5	8.4	48.6	56.1	55.2	55.2	404	422	464	464
Oats	12.1	10.4	8.7	6.9	5.9	4.8	54.3	60.1	50.6	50.6	374	358	243	243
							--Pounds per Acre--				--Million CWT--			
Rice	2.7	2.9	2.9	2.7	2.8	2.8	5,749	5,507	5,571	5,616	154.5	154.9	157.7	159.0
											--Million 480-Pound--			
All Cotton	10.6	12.3	14.1	9.5	11.7	13.5	614	634	630	649	12.2	15.5	17.6	18.2

1/ All estimates are from the USDA, National Agricultural Statistics Service (NASS) and are published in the Crop Production circular available from NASS.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			USSR	Asia					South America		Selected Other			All Other Countries
			United States	Canada	Mexico	EC-12	Oth. W. Europe	Eastern Europe		China	India	Indo-nesia	Paki-stan	Thai-land	Argen-tina	Brazil	Aus-tralia	South Africa	Turkey	
	—Million Metric Tons—																			
Wheat																				
1989/90	537.9	482.4	55.4	24.6	4.0	82.0	4.4	40.7	92.3	90.8	54.1	0.0	14.4	0.0	10.2	5.6	14.2	2.0	12.5	15.4
1990/91 prel.	593.3	518.8	74.5	32.7	3.9	84.7	5.1	41.1	108.0	98.2	49.7	0.0	14.3	0.0	10.5	3.2	15.1	1.7	15.0	17.7
1991/92 proj.																				
October	550.3	496.4	53.9	33.0	3.5	90.3	4.1	39.7	83.0	94.0	54.0	0.0	14.5	0.0	9.0	3.2	11.0	2.1	16.0	18.1
November	547.4	493.5	53.9	33.0	3.7	90.3	4.0	40.7	78.0	96.0	54.0	0.0	14.5	0.0	9.0	3.2	10.0	2.1	16.0	18.1
Coarse Grains																				
1989/90	802.6	581.3	221.4	23.5	14.1	89.8	12.4	60.2	104.8	93.5	34.6	5.0	2.7	4.3	8.3	22.5	6.8	9.5	7.5	81.7
1990/91 prel.	834.0	603.4	230.7	26.1	18.4	84.1	13.7	52.2	113.3	113.5	33.3	5.2	2.9	4.1	11.2	24.2	6.7	8.8	8.9	77.0
1991/92 proj.																				
October	800.3	582.1	218.3	23.5	16.3	88.2	11.9	61.1	90.5	103.6	31.5	5.2	2.5	4.0	10.2	26.7	7.3	8.6	9.7	81.3
November	801.5	582.8	218.7	23.5	18.0	88.2	12.0	61.5	85.5	106.6	31.5	5.2	2.5	4.0	10.5	26.7	6.9	8.6	9.7	81.9
Rice (Milled)																				
1989/90	344.5	339.4	5.1	0.0	0.4	1.4	0.0	0.1	1.7	126.1	74.1	29.1	3.2	13.3	0.2	4.9	0.6	0.0	0.2	23.2
1990/91 prel.	352.2	347.2	5.1	0.0	0.2	1.6	0.0	0.1	1.6	132.5	74.6	29.4	3.3	11.4	0.2	6.3	0.6	0.0	0.2	23.7
1991/92 proj.																				
October	343.9	338.9	5.0	0.0	0.2	1.5	0.0	0.1	1.4	127.4	71.5	28.9	3.3	13.2	0.2	6.8	0.8	0.0	0.1	23.1
November	345.6	340.6	5.0	0.0	0.2	1.5	0.0	0.1	1.4	129.5	71.5	28.7	3.3	13.2	0.2	6.8	0.8	0.0	0.1	23.2
Total Grains 1/																				
1989/90	1,685.0	1,403.2	281.9	48.0	18.5	173.2	16.8	101.0	198.8	310.4	162.7	34.1	20.4	17.6	18.7	33.0	21.7	11.5	20.2	196.7
1990/91 prel.	1,779.6	1,469.4	310.2	58.8	22.5	170.4	18.7	93.5	222.9	344.2	157.5	34.6	20.4	15.5	22.0	33.7	22.3	10.5	24.1	197.9
1991/92 proj.																				
October	1,694.5	1,417.3	277.2	56.5	20.0	180.1	16.0	100.9	174.9	325.0	157.0	34.1	20.3	17.2	19.4	36.7	19.1	10.7	25.9	203.6
November	1,694.6	1,416.9	277.7	56.5	21.9	179.9	16.0	102.4	164.9	332.1	157.0	33.9	20.3	17.2	19.7	36.7	17.7	10.7	25.9	204.2
Oilseeds 2/																				
1989/90	214.1	154.8	59.3	4.9	1.4	11.5	0.7	5.2	13.8	28.5	19.3	2.2	3.3	0.9	15.8	21.8	0.8	1.0	2.3	21.5
1990/91 prel.	217.4	156.7	60.6	5.6	1.0	13.0	0.7	4.3	13.0	33.2	21.0	2.2	3.6	0.7	16.1	17.0	2.0	1.0	1.9	20.2
1991/92 proj.																				
October	222.4	159.7	62.8	6.2	1.1	13.8	0.7	4.2	12.1	33.2	21.5	2.2	3.8	0.7	15.5	19.1	1.1	1.0	1.6	22.1
November	222.4	158.7	63.7	6.2	1.1	13.6	0.7	4.2	12.1	32.5	21.5	2.2	3.8	0.7	15.5	19.1	1.0	1.0	1.6	21.9
	—Million 480-Pound Bales—																			
Cotton																				
1989/90	80.0	67.8	12.2	0.0	0.8	1.5	0.0	0.1	12.3	17.4	10.6	0.0	6.7	0.1	1.3	3.0	1.4	0.3	2.8	9.5
1990/91 prel.	87.0	71.5	15.5	0.0	0.8	1.4	0.0	0.1	12.0	20.7	9.1	0.0	7.5	0.1	1.4	3.1	1.9	0.2	3.0	10.1
1991/92 proj.																				
October	90.7	73.1	17.6	0.0	0.9	1.2	0.0	0.1	11.0	22.0	10.0	0.0	7.8	0.2	1.3	3.5	1.9	0.3	2.7	10.2
November	91.6	73.4	18.2	0.0	0.9	1.3	0.0	0.1	11.0	22.0	10.0	0.0	7.8	0.2	1.5	3.5	1.9	0.3	2.7	10.3

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains and pulses are 210.9 million tons in 1989/90, 235.0 million in 1990/91, and 175.0 million forecast in 1991/92.
2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also includes copra and palm kernels for all countries.
Note: Entries of 0.0 indicate no reported or insignificant production.

TABLE 3

Wheat Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. Oct.	Nov.	1989/90	Prel. 1990/91	1991/92 Proj. Oct.	Nov.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	226.5	232.1	223.5	2.38	2.56	2.47	2.45	537.9	593.3	550.3	547.4
United States	25.2	28.0	23.3	2.20	2.66	2.31	2.31	55.4	74.5	53.9	53.9
Total Foreign	201.3	204.1	200.1	2.40	2.54	2.49	2.47	482.4	518.8	496.4	493.5
Maj. Foreign Exporters	45.1	45.8	44.2	2.91	3.12	3.24	3.22	131.0	143.0	143.3	142.3
Argentina	5.5	5.7	4.9	1.86	1.84	1.84	1.84	10.2	10.5	9.0	9.0
Australia	9.0	9.2	7.8	1.58	1.63	1.41	1.28	14.2	15.1	11.0	10.0
Canada	13.6	14.4	14.7	1.80	2.27	2.24	2.24	24.6	32.7	33.0	33.0
EC-12	17.0	16.5	16.7	4.83	5.14	5.39	5.39	82.0	84.7	90.3	90.3
Major Importers	96.6	98.4	95.8	2.48	2.66	2.46	2.42	239.1	261.4	233.6	231.7
Brazil	3.4	3.3	2.4	1.65	0.97	1.33	1.33	5.6	3.2	3.2	3.2
China	29.8	30.8	30.9	3.04	3.19	3.06	3.10	90.8	98.2	94.0	96.0
Eastern Europe	9.8	9.7	9.9	4.14	4.22	4.05	4.11	40.7	41.1	39.7	40.7
Egypt	0.6	0.7	0.8	5.05	5.79	6.40	6.40	3.2	4.3	4.8	4.8
Other N. Africa 1/	5.0	5.4	5.6	1.14	1.04	1.55	1.50	5.6	5.7	8.1	8.3
Japan	0.3	0.3	0.2	3.47	3.66	3.51	2.93	1.0	1.0	0.9	0.7
USSR	47.7	48.2	46.0	1.94	2.24	1.80	1.70	92.3	108.0	83.0	78.0
Other Foreign	59.7	59.9	60.2	1.88	1.91	1.98	1.99	112.3	114.4	119.4	119.5
India	24.1	23.5	24.3	2.24	2.12	2.22	2.22	54.1	49.7	54.0	54.0
Iran	6.8	6.5	6.2	0.81	1.08	1.15	1.15	5.5	7.0	7.1	7.1
Mexico	1.0	1.0	0.9	4.21	4.11	3.98	4.20	4.0	3.9	3.5	3.7
Non-EC W. Europe	0.8	0.9	0.8	5.18	5.41	5.19	5.18	4.4	5.1	4.1	4.0
Pakistan	7.7	7.8	8.0	1.87	1.82	1.82	1.82	14.4	14.3	14.5	14.5
South Africa	1.8	1.6	1.4	1.11	1.10	1.48	1.48	2.0	1.7	2.1	2.1
Turkey	8.7	8.8	8.9	1.44	1.71	1.80	1.80	12.5	15.0	16.0	16.0
Others	8.7	9.9	9.8	1.77	1.80	1.84	1.84	15.4	17.7	18.1	18.1

1/ Algeria, Libya, Morocco, and Tunisia.

November 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 4

Coarse Grains Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Oct.	Nov.	1989/90	1990/91	Oct.	Nov.
TOTAL COARSE GRAINS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World 1/	323.0	318.1	321.6	2.48	2.62	2.50	2.49	802.6	834.0	800.3	801.5
United States	37.0	36.4	37.3	5.98	6.34	5.86	5.87	221.4	230.7	218.3	218.7
Total Foreign	286.0	281.7	284.3	2.03	2.14	2.06	2.05	581.3	603.4	582.1	582.8
Maj. Foreign Exporters	21.1	20.5	21.4	2.49	2.77	2.51	2.50	52.5	56.8	53.6	53.5
Argentina	3.2	3.3	3.7	2.64	3.43	2.86	2.88	8.3	11.2	10.2	10.5
Australia	3.9	4.1	4.8	1.75	1.64	1.53	1.45	6.8	6.7	7.3	6.9
Canada	8.3	7.9	7.4	2.84	3.30	3.15	3.15	23.5	26.1	23.5	23.5
South Africa	4.2	3.8	4.0	2.24	2.34	2.15	2.15	9.5	8.8	8.6	8.6
Thailand	1.6	1.5	1.5	2.78	2.65	2.65	2.65	4.3	4.1	4.0	4.0
Major Importers	103.8	99.8	101.4	2.73	2.84	2.67	2.63	282.9	283.2	269.5	266.7
Eastern Europe	16.5	15.9	16.2	3.66	3.28	3.80	3.81	60.2	52.2	61.1	61.5
EC-12	20.3	19.3	19.2	4.43	4.35	4.60	4.60	89.8	84.1	88.2	88.2
Other W. Europe	3.1	3.0	2.9	3.98	4.49	4.17	4.19	12.4	13.7	11.9	12.0
Mexico	7.5	8.2	8.6	1.88	2.23	1.94	2.09	14.1	18.4	16.3	18.0
USSR	56.0	52.9	54.2	1.87	2.14	1.67	1.58	104.8	113.3	90.5	85.5
Other Major Import. 2/	0.4	0.4	0.4	3.83	3.63	3.70	3.70	1.6	1.5	1.5	1.5
Other Foreign	161.0	161.3	161.5	1.53	1.63	1.61	1.63	245.8	263.4	259.0	262.6
Brazil	12.5	13.5	13.5	1.79	1.79	1.98	1.98	22.5	24.2	26.7	26.7
China	28.2	29.1	29.1	3.31	3.90	3.62	3.66	93.5	113.5	103.6	106.6
India	37.7	36.8	36.7	0.92	0.90	0.86	0.86	34.6	33.3	31.5	31.5
Indonesia	2.7	2.9	2.9	1.85	1.82	1.79	1.79	5.0	5.2	5.2	5.2
Nigeria	9.9	9.5	9.9	0.82	0.67	0.84	0.84	8.1	6.3	8.3	8.3
Philippines	3.6	3.9	3.9	1.22	1.32	1.24	1.24	4.4	5.1	4.9	4.9
Turkey	4.4	4.5	4.5	1.70	1.99	2.17	2.17	7.5	8.9	9.7	9.7
Others	61.9	61.2	61.0	1.14	1.09	1.14	1.14	70.3	67.0	69.1	69.8
BARLEY											
World	74.9	75.2	77.5	2.27	2.48	2.26	2.20	170.1	186.5	174.6	170.9
United States	3.4	3.0	3.4	2.62	3.02	2.97	2.97	8.8	9.2	10.1	10.1
Total Foreign	71.5	72.1	74.1	2.26	2.46	2.23	2.17	161.3	177.3	164.5	160.7
Australia	2.3	2.5	2.8	1.75	1.62	1.50	1.39	4.0	4.1	4.2	3.9
Canada	4.7	4.8	4.7	2.50	2.97	2.79	2.79	11.7	14.2	13.0	13.0
China	3.3	3.3	3.3	1.74	1.73	1.73	1.73	5.7	5.7	5.7	5.7
Eastern Europe	3.6	3.6	3.8	4.03	4.00	3.84	3.84	14.5	14.3	14.4	14.5
EC-12	12.6	12.3	12.1	4.05	4.12	4.19	4.20	51.0	50.8	50.8	50.9
Other W. Europe	1.5	1.5	1.5	3.87	4.36	3.91	3.90	5.9	6.4	5.9	6.0
Turkey	3.4	3.4	3.4	1.46	1.76	2.00	2.00	4.9	6.0	6.8	6.8
USSR	27.6	26.1	28.5	1.75	2.34	1.65	1.51	48.5	61.0	47.0	43.0
Others	12.6	14.7	14.0	1.20	1.01	1.20	1.21	15.1	14.8	16.6	17.0

FOOTNOTES AT END OF TABLE

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TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Oct.	Nov.	1989/90	1990/91	Oct.	Nov.
CORN	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	126.5	127.3	130.5	3.66	3.76	3.65	3.67	462.5	479.2	473.1	478.4
United States	26.2	27.1	27.8	7.30	7.44	6.83	6.84	191.2	201.5	190.0	190.2
Total Foreign	100.3	100.2	102.7	2.70	2.77	2.78	2.81	271.3	277.7	283.2	288.2
Maj. Foreign Exporters	6.6	6.3	6.8	2.77	3.14	2.79	2.79	18.2	19.8	18.9	18.9
Argentina	1.7	2.0	2.2	3.06	4.00	3.27	3.27	5.2	7.8	7.2	7.2
South Africa	3.5	3.0	3.3	2.56	2.73	2.46	2.46	8.9	8.2	8.0	8.0
Thailand	1.4	1.4	1.3	2.93	2.81	2.80	2.80	4.1	3.8	3.7	3.7
Major Importers	21.2	19.7	21.5	3.93	3.50	3.90	3.94	83.4	68.9	82.7	84.8
Eastern Europe	7.1	6.5	6.6	4.14	3.26	4.69	4.69	29.2	21.1	30.5	30.9
EC-12	3.9	3.4	3.9	6.91	6.27	6.72	6.71	26.9	21.6	26.2	26.1
Other W. Europe	0.2	0.2	0.2	7.83	7.98	7.93	8.34	1.8	1.8	1.8	1.8
Mexico	5.8	6.6	7.2	1.68	2.14	1.83	2.01	9.8	14.1	12.8	14.5
USSR	4.1	2.8	3.5	3.71	3.50	3.14	3.14	15.3	9.8	11.0	11.0
Other Maj. Import. 2/	0.1	0.1	0.1	4.28	4.10	4.18	4.18	0.5	0.5	0.5	0.5
Other Foreign	72.5	74.2	74.4	2.34	2.55	2.46	2.48	169.7	189.0	181.5	184.5
Brazil	12.1	13.0	13.0	1.80	1.81	2.00	2.00	21.8	23.5	26.0	26.0
Canada	1.0	1.0	1.1	6.36	6.91	6.06	6.06	6.4	7.2	6.6	6.6
China	20.4	21.4	21.5	3.88	4.52	4.19	4.23	78.9	96.8	88.0	91.0
Egypt	0.8	0.8	0.9	5.37	5.43	5.59	5.59	4.5	4.6	4.8	4.8
India	5.9	6.1	5.7	1.61	1.54	1.47	1.47	9.4	9.4	8.4	8.4
Indonesia	2.7	2.9	2.9	1.85	1.82	1.79	1.79	5.0	5.2	5.2	5.2
Philippines	3.6	3.9	3.9	1.22	1.32	1.24	1.24	4.4	5.1	4.9	4.9
Zimbabwe	1.2	1.1	1.2	1.72	1.45	1.67	1.67	2.0	1.6	2.0	2.0
Others	24.9	24.1	24.3	1.50	1.48	1.47	1.47	37.3	35.6	35.7	35.7
SORGHUM											
World	41.7	39.2	39.9	1.32	1.35	1.31	1.33	55.0	53.1	52.3	53.0
United States	4.5	3.7	3.9	3.48	3.95	3.65	3.73	15.6	14.5	14.4	14.7
Total Foreign	37.2	35.5	36.0	1.06	1.09	1.06	1.06	39.4	38.5	37.9	38.3
Argentina	0.7	0.7	0.8	2.86	3.57	2.86	2.95	2.0	2.5	2.0	2.3
Australia	0.4	0.4	0.6	2.27	2.22	1.92	1.75	0.9	0.9	1.1	1.0
China	1.6	1.5	1.5	2.72	3.71	3.47	3.47	4.4	5.7	5.2	5.2
India	14.9	14.8	15.0	0.86	0.82	0.80	0.80	12.9	12.1	12.0	12.0
Mexico	1.3	1.3	1.1	2.88	2.85	2.73	2.73	3.8	3.7	3.0	3.0
Nigeria	4.4	4.4	4.4	0.80	0.64	0.80	0.80	3.5	2.8	3.5	3.5
South Africa	0.2	0.2	0.2	1.11	1.12	1.11	1.11	0.3	0.2	0.3	0.3
Sudan	4.0	3.0	3.0	0.45	0.50	0.50	0.50	1.8	1.5	1.5	1.5
Thailand	0.2	0.2	0.2	1.44	1.39	1.47	1.47	0.2	0.3	0.3	0.3
Others	9.4	9.0	9.2	1.02	0.98	0.99	1.00	9.6	8.9	9.1	9.3

FOOTNOTES AT END OF TABLE

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Oct.	Nov.	1989/90	1990/91	Oct.	Nov.
OATS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	22.6	21.3	20.5	1.84	1.98	1.71	1.71	41.4	42.2	35.1	35.1
United States	2.8	2.4	1.9	1.95	2.16	1.81	1.81	5.4	5.2	3.5	3.5
Total Foreign	19.8	18.9	18.6	1.82	1.96	1.70	1.70	36.0	37.0	31.6	31.6
USSR	10.8	10.7	10.7	1.57	1.68	1.36	1.36	16.8	18.0	14.5	14.5
Maj. Foreign Exporters	3.6	2.9	3.0	2.00	2.16	2.00	2.00	7.3	6.4	6.0	6.0
Argentina	0.4	0.3	0.4	1.44	1.34	1.29	1.29	0.6	0.4	0.5	0.5
Australia	1.1	1.1	1.3	1.51	1.43	1.38	1.38	1.6	1.5	1.8	1.8
Canada	1.7	1.2	1.0	2.08	2.34	2.32	2.32	3.5	2.9	2.3	2.3
Sweden	0.4	0.4	0.3	3.54	4.42	4.09	4.09	1.5	1.6	1.4	1.4
Other Foreign	5.4	5.3	4.9	2.21	2.40	2.27	2.28	11.9	12.6	11.1	11.1
China	0.6	0.6	0.6	1.20	1.21	1.18	1.18	0.7	0.7	0.7	0.7
Eastern Europe	1.2	1.2	1.2	2.55	2.70	2.55	2.55	3.2	3.3	3.0	3.0
Czechoslovakia	0.1	0.1	0.1	3.24	4.55	4.00	4.00	0.3	0.4	0.4	0.4
Poland	0.8	0.7	0.7	2.72	2.84	2.67	2.67	2.2	2.1	1.9	1.9
EC-12	1.8	1.6	1.4	2.74	3.07	3.07	3.06	4.8	5.1	4.4	4.4
France	0.3	0.2	0.2	3.73	3.86	3.81	3.81	1.0	0.9	0.8	0.8
Germany	0.6	0.6	0.4	3.58	3.93	4.92	4.92	2.0	2.4	1.9	1.9
Finland	0.4	0.5	0.3	3.24	3.67	3.23	3.23	1.4	1.7	1.1	1.1
Norway	0.1	0.1	0.1	3.13	4.58	4.00	4.00	0.4	0.6	0.5	0.5
Others	1.3	1.3	1.2	1.11	1.09	1.12	1.16	1.4	1.4	1.4	1.4
RYE											
World	16.9	16.6	13.9	2.22	2.33	2.16	2.09	37.6	38.7	30.2	29.1
United States	0.2	0.2	0.2	1.77	1.70	1.55	1.55	0.3	0.3	0.2	0.2
Total Foreign	16.7	16.5	13.8	2.23	2.34	2.17	2.10	37.2	38.5	29.9	28.9
USSR	10.7	10.4	8.5	1.87	2.02	1.71	1.59	20.1	21.0	14.5	13.5
Maj. Foreign Exporter											
Canada	0.5	0.4	0.2	1.74	1.68	1.78	1.78	0.9	0.7	0.4	0.4
Other Foreign											
Eastern Europe	3.3	3.4	3.4	2.94	2.88	2.82	2.82	9.7	9.9	9.5	9.5
Hungary	0.1	0.1	0.1	2.06	2.46	2.40	2.40	0.2	0.2	0.2	0.2
Poland	2.9	3.1	3.0	2.95	2.86	2.82	2.82	8.6	8.8	8.5	8.5
Czechoslovakia	0.2	0.2	0.2	4.05	4.26	3.82	3.82	0.7	0.7	0.7	0.7
EC-12	1.6	1.6	1.2	3.32	3.40	3.65	3.65	5.2	5.4	4.5	4.5
Denmark	0.1	0.1	0.1	4.82	4.95	4.57	4.57	0.5	0.5	0.4	0.4
Germany	1.0	1.0	0.7	3.86	3.87	4.66	4.66	3.9	4.0	3.3	3.3
Others	0.6	0.6	0.5	2.29	2.38	2.21	2.20	1.3	1.5	1.0	1.0

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.
2/ Japan, Republic of Korea, and Taiwan.

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TABLE 5

Rice Area, Yield, and Production
World and Selected Countries and Regions

	AREA			YIELD				PRODUCTION (Rough Basis)				MILLING RATE				PRODUCTION (Milled Basis)			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.			Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Oct.	Nov.	1989/90	1990/91	Oct.	Nov.	1989/90	1990/91	Oct.	Nov.	1989/90	1990/91	Oct.	Nov.
	—Million Hectares—			—Metric Tons Per Hectare—				—Million Metric Tons—				—In Percent—				—Million Metric Tons—			
World	146.4	147.1	146.0	3.5	3.5	3.5	3.5	508.6	519.8	507.6	510.1	67.7	67.8	67.7	67.7	344.5	352.2	343.9	345.6
United States	1.1	1.1	1.1	6.4	6.2	6.2	6.3	7.0	7.0	7.2	7.2	72.6	72.0	70.0	70.0	5.1	5.1	5.0	5.0
Total Foreign	145.3	145.9	144.8	3.5	3.5	3.5	3.5	501.6	512.7	500.5	502.9	67.7	67.7	67.7	67.5	339.4	347.2	338.9	340.6
Maj. Foreign Exporters	16.8	16.6	16.6	2.3	2.2	2.3	2.3	38.5	35.9	37.6	37.6	64.0	63.8	64.1	64.1	24.6	22.9	24.1	24.1
Burma	4.7	4.8	4.5	2.9	2.9	2.8	2.8	13.5	13.7	12.6	12.6	60.0	60.0	60.0	60.0	8.1	8.2	7.6	7.6
Pakistan	2.1	2.1	2.1	2.3	2.3	2.3	2.3	4.8	4.9	5.0	5.0	66.7	66.7	66.7	66.7	3.2	3.3	3.3	3.3
Thailand	10.0	9.7	10.0	2.0	1.8	2.0	2.0	20.2	17.3	20.0	20.0	66.0	66.0	66.0	66.0	13.3	11.4	13.2	13.2
Major Importers	13.9	13.9	13.5	4.2	4.2	4.2	4.2	58.6	58.4	57.7	56.9	66.1	66.0	66.1	66.0	38.7	38.6	38.1	37.5
EC-12	0.3	0.4	0.4	6.2	6.4	6.1	6.0	2.1	2.4	2.3	2.2	67.0	67.4	67.3	67.3	1.4	1.6	1.5	1.5
Indonesia	10.5	10.5	10.1	4.2	4.3	4.4	4.4	44.7	45.2	44.4	44.1	65.0	65.0	65.0	65.0	29.1	29.4	28.9	28.7
Nigeria	0.6	0.7	0.7	1.4	1.4	1.4	1.4	0.9	0.9	0.9	0.9	60.0	60.0	60.0	60.0	0.5	0.6	0.6	0.6
Republic of Korea	1.3	1.2	1.2	6.4	6.2	6.4	6.1	8.1	7.7	7.8	7.4	72.8	72.5	72.7	72.5	5.9	5.6	5.7	5.3
Other Maj. Import. 1/	1.2	1.1	1.1	2.4	1.9	2.0	2.0	2.8	2.2	2.2	2.2	65.5	65.4	65.8	65.8	1.8	1.4	1.5	1.5
Other Foreign	114.6	115.4	114.7	3.5	3.6	3.5	3.6	404.5	418.5	405.3	408.5	68.3	68.3	68.3	68.3	276.1	285.7	276.7	279.0
Australia	0.1	0.1	0.1	8.0	8.8	8.3	8.4	0.8	0.8	1.1	1.1	71.5	71.5	71.5	71.5	0.6	0.6	0.8	0.8
Bangladesh	10.5	10.4	10.5	2.6	2.6	2.6	2.6	26.8	26.9	27.6	27.6	66.7	66.7	66.7	66.7	17.9	17.9	18.4	18.4
Brazil	4.3	4.5	5.3	1.7	2.1	1.9	1.9	7.2	9.3	10.0	10.0	68.0	68.0	68.0	68.0	4.9	6.3	6.8	6.8
China	32.7	33.1	32.8	5.5	5.7	5.6	5.6	180.1	189.3	182.0	185.0	70.0	70.0	70.0	70.0	126.1	132.5	127.4	129.5
India	42.2	42.6	41.1	2.6	2.6	2.6	2.6	111.1	111.9	107.3	107.3	66.7	66.7	66.7	66.7	74.1	74.6	71.5	71.5
Japan	2.1	2.1	2.1	6.2	6.3	6.2	6.2	12.9	13.1	12.9	12.9	72.8	72.8	72.8	72.8	9.4	9.6	9.4	9.4
Philippines	3.4	3.4	3.3	2.6	2.9	2.8	2.8	8.9	9.9	9.3	9.3	65.0	65.0	65.0	65.0	5.8	6.4	6.0	6.0
USSR	0.7	0.6	0.6	3.9	4.0	3.7	3.7	2.6	2.4	2.2	2.2	65.0	65.0	65.0	65.0	1.7	1.6	1.4	1.4
Vietnam	5.7	5.7	5.9	3.3	3.3	3.0	3.0	19.0	19.0	18.0	18.0	66.0	66.0	66.0	66.0	12.5	12.5	11.9	11.9
Others	12.9	13.0	12.9	2.7	2.8	2.7	2.7	35.0	35.8	34.9	35.1	66.1	66.2	66.2	66.2	23.2	23.7	23.1	23.2

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

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TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Oct.	Nov.	1989/90	1990/91	Oct.	Nov.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SOYBEANS											
World	58.26	54.05	55.39	1.84	1.91	1.89	1.90	107.27	103.03	105.36	105.28
United States	24.09	22.87	23.73	2.17	2.29	2.22	2.25	52.35	52.42	52.62	53.39
Total Foreign	34.16	31.18	31.66	1.61	1.62	1.65	1.64	54.92	50.61	52.73	51.89
Maj. Foreign Exporters	16.35	14.40	15.00	1.90	1.83	1.88	1.88	31.09	26.30	28.25	28.25
Argentina	4.95	4.75	5.00	2.17	2.27	2.15	2.15	10.75	10.80	10.75	10.75
Brazil	11.40	9.65	10.00	1.78	1.61	1.75	1.75	20.34	15.50	17.50	17.50
Other Foreign	17.81	16.78	16.66	1.34	1.45	1.44	1.42	23.83	24.31	24.48	23.64
Canada	0.54	0.49	0.58	2.26	2.64	2.14	2.14	1.22	1.29	1.23	1.23
China	8.06	7.56	7.20	1.27	1.46	1.44	1.39	10.23	11.00	10.80	10.00
Eastern Europe	0.70	0.34	0.25	0.97	1.07	1.30	1.35	0.68	0.36	0.36	0.33
EC-12	0.63	0.69	0.55	3.13	3.12	3.14	3.11	1.98	2.17	1.81	1.71
India	2.13	2.39	2.65	0.80	1.02	1.02	1.02	1.72	2.44	2.70	2.70
Indonesia	1.21	1.22	1.24	1.09	1.08	1.04	1.04	1.32	1.32	1.29	1.29
Paraguay	0.98	0.89	0.90	1.61	1.46	1.78	1.78	1.58	1.30	1.60	1.60
USSR	0.83	0.83	0.81	1.15	1.06	1.14	1.14	0.96	0.88	0.92	0.92
Others	2.74	2.37	2.49	1.52	1.50	1.56	1.55	4.17	3.56	3.78	3.86
COTTONSEED											
World	32.27	33.27	34.34	0.96	1.01	1.01	1.02	30.95	33.55	34.69	34.90
United States	3.86	4.75	5.46	1.10	1.14	1.14	1.17	4.24	5.41	6.18	6.38
Total Foreign	28.41	28.53	28.88	0.94	0.99	0.99	0.99	26.71	28.14	28.51	28.52
China	5.20	5.59	6.00	1.24	1.37	1.36	1.36	6.44	7.66	8.16	8.16
India	7.53	7.36	7.27	0.58	0.53	0.59	0.59	4.40	3.90	4.30	4.30
Pakistan	2.60	2.69	2.78	1.12	1.21	1.23	1.23	2.91	3.27	3.40	3.40
USSR	3.33	3.15	3.01	1.53	1.56	1.46	1.46	5.11	4.92	4.40	4.40
Others	9.74	9.74	9.83	0.81	0.86	0.83	0.84	7.85	8.38	8.25	8.26
PEANUTS											
World	19.81	20.01	20.21	1.11	1.14	1.15	1.16	22.05	22.88	23.42	23.51
United States	0.67	0.73	0.80	2.72	2.23	2.82	2.82	1.81	1.63	2.24	2.24
Total Foreign	19.15	19.28	19.41	1.06	1.10	1.08	1.10	20.24	21.25	21.18	21.27
Argentina	0.18	0.20	0.19	1.87	2.37	2.11	2.11	0.34	0.48	0.40	0.40
China	2.96	2.91	2.92	1.81	2.19	1.99	2.09	5.37	6.37	6.00	6.10
India	8.71	8.65	8.70	0.93	0.93	0.94	0.94	8.09	8.08	8.20	8.20
Senegal	0.78	0.92	0.90	1.04	0.73	0.77	0.77	0.82	0.67	0.70	0.70
South Africa	0.09	0.09	0.09	1.28	1.59	1.50	1.50	0.11	0.14	0.14	0.14
Sudan	0.55	0.54	0.53	0.73	0.60	0.75	0.75	0.40	0.33	0.40	0.40
Others	5.88	5.98	6.08	0.87	0.87	0.88	0.88	5.13	5.19	5.35	5.34

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TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Oct.	Nov.	1989/90	1990/91	Oct.	Nov.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SUNFLOWERSEED											
World	15.88	16.25	16.40	1.38	1.37	1.31	1.30	21.87	22.29	21.43	21.36
United States	0.72	0.75	1.02	1.10	1.38	1.46	1.46	0.80	1.03	1.50	1.50
Total Foreign	15.16	15.50	15.37	1.39	1.37	1.30	1.29	21.07	21.26	19.93	19.86
Argentina	2.80	2.30	2.50	1.36	1.70	1.40	1.40	3.80	3.90	3.50	3.50
China	0.72	0.70	0.71	1.49	1.71	1.62	1.62	1.06	1.20	1.15	1.15
EC-12	2.13	2.55	2.39	1.67	1.62	1.71	1.67	3.54	4.13	4.10	3.99
East Europe	1.27	1.23	1.20	1.81	1.70	1.77	1.78	2.29	2.09	2.08	2.15
USSR	4.46	4.67	4.60	1.59	1.41	1.30	1.30	7.07	6.56	6.00	6.00
Others	3.80	4.06	3.97	0.87	0.83	0.78	0.77	3.32	3.38	3.11	3.07
RAPESEED											
World	17.12	18.24	19.90	1.28	1.39	1.37	1.37	21.85	25.37	27.23	27.22
United States 1/	0.03	0.03	0.06	1.58	1.74	1.75	1.75	0.05	0.05	0.11	0.11
Total Foreign	17.09	18.21	19.84	1.28	1.39	1.36	1.37	21.80	25.32	27.12	27.12
Canada	2.90	2.58	3.27	1.07	1.27	1.28	1.28	3.10	3.28	4.20	4.20
China	4.99	5.50	6.10	1.09	1.26	1.16	1.16	5.44	6.96	7.10	7.10
EC-12	1.81	2.13	2.43	2.96	2.89	3.00	3.00	5.34	6.14	7.29	7.29
East Europe	0.81	0.74	0.69	2.66	2.38	2.41	2.41	2.15	1.75	1.66	1.66
India	4.99	5.72	5.70	0.83	0.94	0.88	0.88	4.12	5.40	5.00	5.00
Others	1.59	1.54	1.66	1.04	1.16	1.10	1.13	1.65	1.78	1.88	1.87
FLAXSEED											
World	3.74	3.76	3.38	0.50	0.61	0.60	0.60	1.85	2.30	2.02	2.02
United States	0.07	0.10	0.12	0.47	0.95	0.97	0.97	0.03	0.10	0.11	0.11
Total Foreign	3.67	3.66	3.26	0.50	0.60	0.58	0.58	1.82	2.20	1.90	1.90
Argentina	0.58	0.58	0.42	0.90	0.83	0.86	0.86	0.52	0.48	0.36	0.36
Canada	0.60	0.73	0.54	0.83	1.29	1.30	1.30	0.50	0.94	0.70	0.70
India	1.18	1.17	1.10	0.29	0.31	0.32	0.32	0.34	0.36	0.35	0.35
USSR	0.97	0.85	0.85	0.24	0.19	0.21	0.21	0.23	0.16	0.18	0.18
Others	0.36	0.34	0.35	0.67	0.78	0.89	0.89	0.24	0.26	0.31	0.31
MAJOR OILSEEDS	147.08	145.58	149.61	1.40	1.44	1.43	1.43	205.85	209.41	214.14	214.29
United States	29.44	29.23	31.18	2.01	2.07	2.01	2.04	59.29	60.65	62.76	63.73
Total Foreign	117.64	116.35	118.43	1.25	1.28	1.27	1.27	146.56	148.77	151.38	150.56
COPRA	--	--	--	--	--	--	--	4.90	4.69	4.69	4.57
PALM KERNEL	--	--	--	--	--	--	--	3.33	3.28	3.59	3.59
TOTAL OILSEEDS	--	--	--	--	--	--	--	*214.08*	*217.38*	*222.41*	*222.45*
PALM OIL 2/	--	--	--	--	--	--	--	10.91	11.08	11.91	11.91

1/ U.S. rapeseed estimates by the WAOB and Interagency Oilseeds Committee. 2/ Not included in total oilseeds.

November 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 7

Cotton Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Oct.	Nov.	1989/90	1990/91	Oct.	Nov.
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	31.6	33.1	34.2	552	573	578	583	80.0	87.0	90.7	91.6
United States	3.9	4.7	5.5	688	711	706	727	12.2	15.5	17.6	18.2
Total Foreign	27.7	28.3	28.8	533	550	554	556	67.8	71.5	73.1	73.4
Maj. Foreign Exporters	13.1	13.2	13.5	727	790	775	776	43.7	48.0	48.3	48.3
Australia	0.2	0.3	0.3	1,271	1,563	1,379	1,532	1.4	1.9	1.9	1.9
Central America 1/	0.1	0.1	0.1	832	810	742	742	0.3	0.3	0.3	0.3
China	5.2	5.6	6.0	728	807	798	798	17.4	20.7	22.0	22.0
Egypt	0.4	0.4	0.4	683	719	811	811	1.3	1.4	1.3	1.3
Mexico	0.2	0.2	0.3	891	914	754	737	0.8	0.8	0.9	0.9
Pakistan	2.6	2.7	2.8	560	607	612	612	6.7	7.5	7.8	7.8
Sudan	0.3	0.2	0.2	456	422	498	494	0.6	0.4	0.4	0.4
Turkey	0.7	0.6	0.6	851	1,021	956	956	2.8	3.0	2.7	2.7
USSR	3.3	3.2	3.0	805	827	796	796	12.3	12.0	11.0	11.0
Major Importers 2/	0.4	0.4	0.3	887	801	833	861	1.5	1.5	1.3	1.4
Other Foreign	14.3	14.7	14.9	346	326	345	348	22.6	22.0	23.5	23.7
Argentina	0.6	0.6	0.6	486	467	465	501	1.3	1.4	1.3	1.5
Brazil	1.9	2.0	2.0	347	340	381	381	3.0	3.1	3.5	3.5
India	7.3	7.4	7.3	315	270	298	298	10.6	9.1	10.0	10.0
Syria	0.2	0.2	0.2	930	963	934	934	0.7	0.7	0.7	0.7
Others	4.3	4.6	4.8	357	369	368	370	7.0	7.7	8.0	8.1

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

November 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 8

The table below presents a 10-year record of the difference between the November projections and the final estimates. Using world wheat production as an example, changes between the November projection and the final estimate have averaged 6.7 million tons (1.3 percent) and ranged from -18.1 to 7.2 million tons. The November projection has been below the final 7 times and above the final 3 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 - 1990/91 1/					
	Difference		Lowest	Highest	Below	Above
	Average	Average	Difference		Final	Final
	Percent	---Million Metric Tons---			Number of Years 2/	
WHEAT						
World	1.3	6.7	-18.1	7.2	7	3
U.S.	0.5	0.3	-1.2	0.2	6	4
Foreign	1.6	6.8	-18.2	7.4	7	3
COARSE GRAINS 3/						
World	1.0	8.1	-19.1	7.8	7	3
U.S.	1.3	2.7	-7.5	2.1	8	2
Foreign	1.1	6.4	-14.3	6.0	6	4
RICE (Milled)						
World	2.5	7.9	-16.8	1.6	9	1
U.S.	2.7	0.1	-0.2	0.2	6	3
Foreign	2.6	7.9	-16.9	1.7	9	1
SOYBEANS						
World	2.4	2.2	-4.4	3.6	4	6
U.S.	2.6	1.3	-2.7	2.1	3	7
Foreign	3.9	1.7	-2.3	3.4	5	5
		---Million 480-lb. Bales---				
COTTON						
World	2.4	1.9	-6.5	2.8	7	3
U.S.	2.7	0.3	-0.8	0.5	6	3
Foreign	2.7	1.8	-6.8	2.3	5	5
UNITED STATES		-------Million Bushels-------				
CORN	2.0	134	-368	89	7	3
SORGHUM	3.3	25	-59	39	6	4
BARLEY	1.7	8	-12	24	5	4
OATS	1.3	6	-18	16	6	3

1/ The final estimate for 1981/82-1989/90 is defined as the first November estimate following the marketing year and for 1990/91 last month's estimate.
2/ May not total ten if projection was the same as the final.
3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

November 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

MAP 1

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

NOVEMBER 12, 1991

1 - UNITED STATES

Earlier dry, warm weather aids harvest in the corn belt and maturation in all cotton areas. Dryness hampers HRW wheat establishment, followed by a protective snow cover and record cold in early November.

2 - SOUTH AMERICA

In Argentina, widespread rain favors germination and early development of corn, soybeans, and cotton. Moisture is favorable for grain-filling winter wheat, and for summer crops across southern Brazil. However, in Sao Paulo and eastern Minas Gerais, rain is needed for coffee and citrus flowering.

3 - EUROPE

Widespread rain slows sugarbeet and late corn harvesting in the west and southeast. The moisture boosts winter grain establishment throughout the region but topsoil moisture is limited in the northeast, where recent cold weather induces winter grain hardening.

4 - WESTERN USSR

Late October rain improves moisture for winter wheat in the southeast, but unseasonably cool weather limits plant establishment. Corn harvest progresses slowly.

5 - SOUTH AFRICA

Early season rains improve planting prospects in primary corn areas.

6 - SOUTH ASIA

Conditions generally favor maturing summer crops. Rain in eastern and southern rice areas boosts reservoirs for dry season crops, but a recent cyclone floods the south coast. Winter wheat planting progresses.

7 - EASTERN ASIA

Dry weather helps summer crop harvesting across the country, but moisture is needed for North China Plain winter wheat germination. Portions of southern China still need rain to replenish reservoirs. Several typhoons hit Japan causing widespread flooding.

8 - SOUTHEAST ASIA

Lingering monsoon rains in Indochina increase reservoirs for dry season rice but cause more local flooding. Drought persists in Java's rice areas. Two storms hit the Philippines, causing local flooding and crop damage but providing much needed moisture to many crop areas.

9 - AUSTRALIA

Drought in southern Queensland and northern New South Wales hurts winter wheat. Western areas also receive below normal rainfall. Recent rains increase planting moisture for eastern summer crops, but more is needed.

(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 720-7917.)

WEATHER BRIEFS

SOUTH AFRICA: SPRING RAINFALL ABOVE NORMAL

Above normal early spring rainfall (October 1-November 11, 1991) in the Maize Triangle of South Africa benefited the wheat crop and provided adequate soil moisture for early corn planting. During October 1991, rainfall was 200 - 800 percent of normal across major corn growing areas, the Transvaal and Orange Free State. Drier weather during November 2-8, 1991, favored early field work. Corn planting should generally be in full progress by mid-November. Rainfall during October and early November 1991, was also above normal and beneficial across sugarcane regions of Natal. Periods of heavy rainfall across the southern and eastern Cape Province during October 20-November 7, 1991 caused some damage to mature wheat, but reduced the impact of a multi-year drought.

CHINA: DRYNESS AFFECTS WINTER WHEAT CROP

Much of the North China Plain is dry affecting establishment of the 1992 winter grain crop. Light rain (about 10 mm) fell across this region on November 6-7, 1991, the only measurable precipitation since mid-September. Dryness has hurt winter wheat across southern Shandong, Henan, Anhui, and Jaingsu. Planting has been delayed and newly emerged wheat has been stressed. Early season stress to winter wheat can cause poor establishment, reduce tiller counts, and hinder adequate winter hardening. Temperatures have been generally mild until November 1, 1991, when freezing temperatures dipped as far south as Shandong and Henan.

AUSTRALIA: SOME RAIN, BUT DROUGHT CONTINUES

Rainfall amounts continued across eastern Australia at below normal levels during October 11-November 11, 1991. Periods of light-to-moderate rain brought some relief to portions of New South Wales, Victoria, and southern Queensland during October 20-November 8, 1991. This rain was of little benefit to winter grains, but improved topsoil moisture levels, benefiting summer crop planting. The drought in Queensland has already caused delays in cotton and sorghum planting and stressed pastures and northeast coast sugarcane. Temperatures in eastern Australia during late October and early November have been mostly 1-3 degrees above normal, somewhat increasing crop stress.

PRODUCTION BRIEFS

ARGENTINA: PRESIDENTIAL DECREE DEREGULATES AGRICULTURE

Argentine presidential decree 2248/91, published November 1, 1991, will deregulate much of the farm economy, according to the U.S. agricultural attache in Buenos Aires. If fully implemented, the decree would dissolve the National Grain Board (JNG), the National Meat Board (JNC), and the National Sugar Board and affect laws covering production and marketing of tobacco, sugar, meat, and dairy products. In addition, the statistical tax on exports and imports would be eliminated as well as the fee schedule for grain transportation by truck. Taxes and transportation are a major share of the high marketing costs associated with Argentine agriculture. The government expects that grain transportation costs will be reduced by 30 percent as a result of these reforms. The abolition of the commodity boards makes official, in some respects what was already reality because they had not been operating as originally intended. Some functions of the JNG and the JNC, such as maintaining quality standards and collecting and publishing statistics on production and export registrations, will likely be transferred to the Agricultural Secretariat.

BRAZIL: 1991/92 SOYBEAN PLANTING OUTLOOK

With planting of the 1991/92 soybean crop nearly 10 percent complete (as of November 1), there is still considerable uncertainty about the eventual acreage that will be seeded. Although there is a general consensus that a continuing domestic corn shortage and favorable prices will allow corn to partially displace soybeans in the southern growing region, area expansion in the center-west states may offset the decline in the south. Recent changes in Brazilian agricultural policy may also favor increased soybean plantings. During the past several weeks the government improved production credit terms available to growers and abolished the minimum price differentials between the center-west states and the southern states. The improved credit situation should encourage more soybean plantings. The deregionalization of minimum prices for soybeans, as well as corn, sorghum, and rice, is intended to encourage planting in the center-west states, a reversal of last year's policy which led to serious cropping area reductions in that region. In addition, the planting season for cotton and corn is nearing an end in the Center-South and with prolonged dry weather restricting plantings of both, the possibility for area diversions to soybeans increases. The recent devaluation of the local currency is also seen as an incentive for soybean production.

BRAZIL: 1991/92 COTTON PLANTING OUTLOOK

The Government of Brazil has announced several new measures aimed at encouraging increased plantings and input utilization for the November-April 1991/92 cotton crop in the Center-South. Cotton is also grown in June-October in northeastern Brazil. On October 10, 1991, the government installed a new credit policy which reduced interest rates and made production credit more attractive. On November 1, 1991, the government raised minimum prices and VBC's (basic production costs) to keep them in line with inflation. In spite of these attempts to stimulate plantings, producers argue that the new measures were announced too late to impact cotton planting intentions and that the revised interest rates are still too high. In addition to these economic factors, agronomic considerations threaten to reduce cotton plantings. Prolonged dry weather in several key producing states has caused some delays in tilling and planting of the 1991/92 crop. The delays may cause shifting of cotton area to corn or soybeans which have planting seasons through December. However, the Parana State Secretariat of Agriculture has extended the official planting season for purposes of crop insurance from October 20 to November 10, giving farmers additional time to plant without losing the right to government crop insurance.

CANADA: WINTER WHEAT PLANTINGS AT RECORD LEVEL IN ONTARIO

The 1992/93 winter wheat planted area in Ontario is reported to be a record 0.38 million hectares, nearly double the 1991/92 area, according to the U.S. agricultural counselor in Canada. The potential record plantings are attributed to attractive income guarantees under the Gross Revenue Insurance Program, early soybean harvest, and ample soil moisture at planting time. Ontario produces about 70 percent of Canada's winter wheat. Winter wheat accounts for about 5 percent of Canada's total wheat output.

CANADA: FARMERS RECEIVE AID PACKAGE

On October 11, 1991 the Canadian Agricultural Minister announced a U.S.$709 million equivalent farm-aid package as part of a comprehensive strategy to deal with the the income problems of Canadian farmers. While grain farmers will be the major recipients, the package includes U.S.$89 million in assistance for producers of other commodities. Details of the aid package are being finalized in line with recommendations by the Third Line of Defense Committee. (The Committee is an advisory group of farm leaders and government officials created last year to address issues facing the farm sector.) The aid is in addition to the U.S.$2.2 billion which will be disbursed to grain and oilseed producers participating in the Gross Revenue Insurance Plan (GRIP) and Net Income Stabilization Account (NISA).

CHINA: FEED AND POULTRY SITUATION IN SOUTHERN PROVINCES

The feed and poultry industries in southern China have undergone explosive growth over the past few years. Guangdong province, adjacent to Hong Kong, is the largest compound feed producer in the country. Production doubled to just over 2 million tons between 1985 and 1990 and is expected to double again to 4.5 million tons by 1995. Despite these huge increases, Guangdong is currently a feed deficit province and must import 4 to 5 million tons a year, almost all from other parts of the country. Guangdong had a poultry population of 632 million in 1990, and numbers have been increasing by 11 percent each year. About 65 percent of total compound feed supply is used to raise poultry (chickens, geese, and ducks) for meat, and another 8 percent for layers. While these percentages will remain relatively stable over the next 5 years, feed use in aquaculture is expected to increase from the current 2 percent to 15 percent of total feed production. The potential for growth in the egg market is underscored by the following facts: egg supplies to Guangzhou City are about 300 eggs per person per year, but egg supplies to Guangdong Province overall, which has a population of 65 million, are just 25 eggs per person per year.

CHINA: LARGE GRAIN HARVEST EXPECTED IN THE NORTHEAST

Provincial officials expect a large grain crop this year in China's northeastern provinces of Liaoning, Jilin, and Heilongjiang. Production in Liaoning is forecast to equal or exceed the target of 14.5 million tons (including soybeans, pulses, and potatoes) because of liberal use of inputs and favorable weather. Jilin expects to harvest 17.5 million tons of grain, the second largest crop in history, despite reports that nearly one half of its total sown area was affected by drought and/or floods. Heavy flooding in Heilongjiang reportedly affected 2.62 million hectares of grain and other crops, 30 percent of the total sown area, and about 867,000 hectares of crops were completely destroyed. However, Heilongjiang still had an abundant grain harvest because of an increase in total sown area, greater use of higher-yielding varieties of corn and rice, heavier use of fertilizer and other inputs, and favorable autumn weather. Total grain production in Heilongjiang will be at least 20 million tons, second only to last year's record crop.

INDONESIA: DROUGHT HAMPERS RICE PLANTING

Sporadic rain fell in Indonesia in early November, but did not end the persistent drought covering Java, southern Sumatra, and Kalimantan. As a result, the main season rice planting for 1992 harvest is being delayed. These three regions produce over 85 percent of Indonesia's total rice, with Java alone producing 60 percent. The main season crop accounts for two-thirds of Indonesia's total rice production. Reports indicate an increasing number of communities suffering water shortages. Reservoirs are low and rain is needed to replenish supplies so that farmers can start planting. Although the main season planting can be extended into January, rice is usually planted by the end of November and harvested in May.

THE PHILIPPINES: PINEAPPLE CROP ESTIMATE REVISED UPWARD

The U.S. agricultural counselor in Manila reports that the estimate of the 1991 pineapple crop has been revised upward to 1,160,000 tons, 10,000 more than the preliminary forecast in April, but still only moderately above the 1990 crop. The increase reflects a larger than anticipated "plant" crop from newly opened production areas in Davao. Latest crop estimates are:

	1989	1990	1991 (April)	1991 (November)
Area Planted (Ha.)	60,973	61,000	62,000	62,000
Area Harvested (Ha.)	32,925	31,720	32,860	32,860
Production (MT)	1,178,750	1,156,000	1,150,000	1,160,000

THAILAND: PINEAPPLE ESTIMATE RAISED

The preliminary forecast for 1991 fresh pineapple production in Thailand has been revised upward to 1,632,000 tons, according to the U.S. agricultural attache in Bangkok. This is 9 percent greater than the April 1991 estimate and an 8 percent increase over the 1990 harvest. Unseasonably dry conditions from early 1990 through May 1991 lowered yields and compromised sizing of the early season crop. However, a turnaround in the rainfall pattern since June 1991, coupled with heightened grower attention to cultivation practices, is expected to boost yields for the secondary, winter crop enough for production to reach a more normal level slightly above the previous 5-year average of 1,616,000 tons. Latest crop estimates are:

	1989	1990	1991 (April)	1991 (November)
Area Planted (Ha.)	95,000	100,000	105,000	105,000
Area Harvested (Ha.)	71,250	75,000	78,000	78,000
Production (MT)	1,732,000	1,512,000	1,500,000	1,632,000

FEATURE COMMODITY ARTICLES

WORLD SUGAR PRODUCTION

World 1991/92 centrifugal sugar production is estimated at 112.6 million tons (raw value), down 0.6 million from the September forecast and 400,000 less than last year. World sugar production from cane is forecast at 73.5 million tons, up 1 percent from the September forecast and 3 percent more than in 1990/91. Harvested area of cane is estimated at 11.7 million hectares, unchanged from September but 3 percent more than the 1990/91 harvested area. World sugar outturn from sugarbeets at 39.1 million tons for 1991/92 is down 2 percent from September's forecast and 5 percent less than last year. Harvested area of sugarbeets is estimated at 8.5 million hectares, down 2 percent from the area harvested in 1990/91.

European Community (EC) sugar production, accounting for 14 percent of the world's total, is down 5 percent from the September forecast and down 9 percent from the 1990/91 crop. The November decline was attributed to a 7 percent decrease in sugarbeet yields, though partially offsetting the decline was an increase of 7,000 hectares in area harvested. The recovery rate of the 1991/92 crop of 15.6 percent compares with 16.2 in the previous season brought on by a higher sugar content in the beets. In France, the largest producer in the EC, sugar output is down 4 percent from September and 9 percent (450,000 tons) from the 1990/91 crop. The decrease, from a year ago, is attributed to a 21,000 hectare decline in area harvested and a reduction of 1.4 percent in sugar content to 17.2. In Germany, the second largest producer in the EC, sugar outturn is forecast at 4.15 million tons, down 9 percent from September. Last season, combined East and West German sugar production was 4.67 million. Some other EC-12 countries showing decreases from last season are Spain, Belgium-Luxembourg, Denmark, and the Netherlands down 5, 21, 15, and 22 percent, respectively. The Denmark forecast was unchanged from September, but Spain, Belgium-Luxembourg, and the Netherlands were down 10, 7, and 5 percent, respectively. In Italy, the new estimate is down 3 percent from September but up 4 percent from last year mainly because of a 10,000 hectare increase in area harvested. Sugar outturn for 1991/92 in the United Kingdom is expected to be the same as a year ago.

In India, the world's largest sugar producer, outturn for the 1991/92 season is estimated at a record 13.6 million tons, up 1 percent from September and 3 percent from last year's record level. The Indian sugar industry continues to expand, despite the tenuous financial condition of most of the public sector sugar companies and many of those in the cooperative and private sectors. The sugarcane area harvested for centrifugal sugar increased 70,000 hectares in the 1991/92 season and is 210,000 hectares more than 2 years ago. The sugarcane yield is expected to be down from last season, but the recovery rate of 10.8 percent will be a record-high level. Khandsari and gur compete with sugar mills for sugarcane. Gur is a crystallized brown type sugar produced by small, on-farm units and consumed locally. Khandsari, accounting for less than 5 percent of the total centrifugal sugar production, is a native semi-white sugar. Khandsari production, forecast at 400,000 tons in 1991/92, is included in India's total centrifugal production.

The system of paying farmers for their sugarcane in India varies considerably from region to region. In north India, the major producing states of Punjab, Haryana, and Bihar generally follow the lead of Uttar Pradesh in setting a politically determined "state advised" sugarcane price which is far above the national government's minimum price. For the 1990/91 season it was rs. 23 (U.S.$1.27) per 100 kg. In Maharashtra, the largest sugar producing state, virtually all sugar is produced by cooperatives which make initial payments slightly exceeding the government's minimum price, with subsequent payments depending on returns for the entire season. Variations on this payment pattern are followed throughout the South. The financial condition of mills in the southern region is better than the North, which must come up with the full sugarcane price within 3 weeks of delivery, many months before the resulting sugar is released by the government to ration shops or the open market.

Based on Soviet information, the 1991/92 USSR sugar production is estimated at 8.7 million tons, making the Soviet Union the world's second largest producer. This estimate is down 3 percent from September and down 5 percent (460,000 tons) from a year earlier. The decline from 1990/91 is attributed to a 4 percent reduction in both sugarbeet area and in sugarbeet yields. The estimate of 75 million tons of raw sugarbeet material is 8 percent less than last year and the lowest since the 1982/83 harvest. Weather in 1991 had not been altogether favorable throughout most of the year. The major sugarbeet areas had the problem of too much rainfall during the growing season rather than suffering from a lack of moisture. The lack of delivery of herbicides led to weed infestations in many regions restricting the development of the sugarbeet plant. Further, adverse weather had a negative impact on sugarbeet harvesting.

In Brazil, the 1991/92 sugar crop is up slightly from the September forecast, and up 8 percent from the 1990/91 crop. The forecast approximates the outturn of sugar authorized by the Government of Brazil. A 4 percent increase in the area of sugarcane harvested is forecast for the 1991/92 season.

Sugar production in Asia is estimated up marginally from the September forecast and shows an increase of 4 percent over last year. All six of the major producing countries in this region expect increases over last season except Indonesia, which is down 3 percent. In China, sugar output is unchanged from the forecast in September but 5 percent more than last year's crop. Production at this level is a record and surpasses the 1990/91 record harvest of 6.6 million tons. Sugar production from sugarbeets is expected to increase 8 percent over the 1990/91 crop and the outturn from cane is forecast up 5 percent. Sugarbeet area of 750,000 hectares for 1991/92 is up 12 percent, while sugarcane area is expected to increase by 4 percent. In Thailand, the 1991/92 forecast is up 10 percent from the September number and 11 percent above the previous season. The 1991/92 sugarcane area is expected to increase by 4 percent over that of last season. The expansion of planted area is occurring mainly in the Northeast, lower North, and Eastern regions. Sugarcane has been substituted in place of cassava, corn, and soybeans in the lower North and Eastern regions, while some cassava areas in the East have also been converted to sugarcane. Good monsoon rains since early August provided adequate moisture to stimulate the growth of sugarcane, despite 2 months of dryness during June and July. The ratoon crops in general seem to be good as they received adequate moisture in mid-April and May. The above average yield from the ratoon crop could compensate for some expected reduced yields in the newly planted sugarcane crop, which was affected by a shortage of water during the vegetative growth period. The sugarcane crush is expected to reach a record level 44 million tons. Improvements in crushing technology and more

careful handling of the cane should improve the realized sucrose yield of the upcoming crop to about 100 kgs/ton, compared with 97.47 last season. Heightened grower interest in sugarcane production is attributable to the low interest advance payment provided by the sugar millers. The relocation of some crushing plants into non-traditional sugarcane regions has also spurred production.

In the Philippines, the sugar production estimate is unchanged from the September forecast but up 11 percent from last season based on expectations of larger harvested area, higher sugarcane yields, and higher sugar recovery rates relative to 1990/91. However, some downward adjustment in planted area and raw material production was made to reflect losses in southwestern Luzon attributable to the ongoing eruptions and mud flows from Mount Pinatubo since June 9, 1991. This is expected to be offset by higher sugarcane yields and sugar recovery in 1991/92 for the major Negros-Panay production area of the western Visayas islands.

In South Africa, the sugar production estimate is up 3 percent from the September forecast and up 2 percent from last season though harvested area is expected to be down 2 percent. Offsetting the lower area is an expected increase in the crush by 4 percent over the 1991/92 crop. South Africa has regained its U.S. sugar quota. This has caused an upbeat mood to the sugar industry.

The sugar production estimate for Australia is down 2 percent from September and 10 percent from a year ago because of a prolonged dry spell in the sugar growing areas of Queensland. Partially offsetting the decline is a 3 percent increase in sugarcane area.

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TABLE 9

WORLD CENTRIFUGAL SUGAR PRODUCTION
1988/89 - 1991/92 1/

COUNTRY/REGION	1988/89	1989/90	1990/91 2/	Forecast 1991/92 Sept	Forecast 1991/92 Nov
	(1,000 Metric Tons)				
NORTH AMERICA					
Canada	104	121	138	130	145
Mexico	3,678	3,100	3,600	3,450	3,450
United States 3/	6,089	6,008	6,287	6,690	6,690
SUBTOTAL	9,871	9,229	10,025	10,270	10,285
SOUTH AMERICA					
Argentina	1,284	944	1,240	1,350	1,350
Bolivia	162	180	225	230	230
Brazil	8,582	7,703	7,900	8,500	8,520
Chile	446	448	370	350	380
Colombia	1,435	1,611	1,602	1,665	1,650
Ecuador	315	331	352	360	360
Guyana	165	130	147	160	175
Paraguay	105	120	100	110	110
Peru	626	620	560	520	600
Suriname	1	1	1	1	1
Uruguay	85	75	70	70	85
Venezuela	513	495	515	480	520
SUBTOTAL	13,719	12,748	13,082	13,796	13,981
CENTRAL AMERICA					
Belize	92	102	102	100	100
Costa Rica	224	245	265	260	270
El Salvador	176	211	270	260	250
Guatemala	705	875	1,015	900	1,050
Honduras	184	199	186	210	200
Nicaragua	158	198	240	280	270
Panama	109	119	120	120	120
SUBTOTAL	1,648	1,949	2,198	2,130	2,260
CARIBBEAN					
Barbados	66	69	66	70	70
Cuba	8,100	8,000	7,623	7,500	7,300
Dominican Republic	735	632	656	660	670
Guadeloupe	90	42	70	75	75
Haiti	40	35	30	30	30
Jamaica	192	219	233	240	240
Martinique	2	2	4	5	5
Puerto Rico	83	62	67	68	68
St. Kitts - Nevis	32	25	15	20	20
Trinidad and Tobago	97	121	110	105	110
SUBTOTAL	9,437	9,207	8,874	8,773	8,588
EEC					
Belgium-Luxembourg	1,005	1,039	1,119	950	885
Denmark	550	529	591	500	500
France 4/	4,372	4,204	4,744	4,480	4,300
Germany	3,578	4,087	4,672	4,550	4,150
Greece	235	421	315	340	340
Ireland	212	233	245	230	230
Italy	1,609	1,880	1,587	1,700	1,650
Netherlands	1,074	1,241	1,339	1,100	1,050
Portugal	2	2	2	4	2
Spain	1,289	1,037	1,036	1,090	985
United Kingdom	1,417	1,322	1,360	1,350	1,360
SUBTOTAL	15,343	15,995	17,010	16,294	15,452
OTHER WEST EUROPE					
Austria	358	457	451	490	490
Finland	154	168	176	130	155
Sweden	375	401	419	215	230
Switzerland	150	152	160	150	150
SUBTOTAL	1,037	1,178	1,206	985	1,025

FOOTNOTES AT END OF TABLE CONTINUED

NOVEMBER 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 9 (Continued)

WORLD CENTRIFUGAL SUGAR PRODUCTION
1988/89 - 1991/92 1/

COUNTRY/REGION	1988/89	1989/90	1990/91 2/	Forecast 1991/92 Sept	Forecast 1991/92 Nov
	(1,000 Metric Tons)				
EAST EUROPE					
Albania	24	16	14	20	15
Bulgaria	80	60	80	50	70
Czechoslovakia	707	878	700	700	850
Hungary	513	630	550	650	650
Poland	1,825	1,865	2,174	1,750	1,700
Romania	425	499	334	310	400
Yugoslavia	660	930	885	820	820
SUBTOTAL	4,234	4,878	4,737	4,300	4,505
USSR 5/	8,900	9,530	9,160	9,000	8,700
NORTH AFRICA					
Algeria	10	10	10	10	10
Egypt	945	957	985	975	975
Morocco	527	494	519	550	550
Sudan	360	420	480	450	500
Tunisia	30	35	30	30	30
SUBTOTAL	1,872	1,916	2,024	2,015	2,065
OTHER AFRICA					
Angola	35	35	35	35	35
Benin	4	4	5	5	5
Burkina	20	20	20	20	20
Burundi	4	8	10	10	10
Cameroon	35	40	40	40	40
Chad	20	20	20	20	20
Congo (Brazzaville)	35	35	35	35	35
Cote d' Ivorie	146	164	180	180	180
Ethiopia	169	183	190	200	200
Gabon	20	20	20	20	20
Ghana	10	10	5	5	5
Guinea	25	25	25	25	25
Kenya	411	441	430	430	480
Madagascar	120	125	125	125	125
Malawi	185	175	200	180	200
Mali	20	20	20	20	20
Mauritius	672	602	661	650	625
Mozambique	25	30	35	40	40
Nigeria	53	53	59	60	60
Reunion	262	178	190	220	220
Rwanda	5	5	5	5	5
Senegal	60	60	60	60	60
Sierra Leone	5	6	6	[illegible]	[illegible]
Somalia	45	35	40	40	40
South Africa	2,340	2,289	2,282	2,265	2,330
Swaziland	462	504	527	510	500
Tanzania	101	95	112	110	115
Togo	4	4	5	5	5
Uganda	10	30	30	30	30
Zaire	60	60	60	60	60
Zambia	150	142	133	140	140
Zimbabwe	459	502	350	440	370
SUBTOTAL	5,972	5,920	5,915	5,993	6,028
MIDDLE EAST					
Iran	630	600	700	700	700
Iraq	10	10	10	10	5
Lebanon	6	6	6	6	6
Syria	30	41	43	50	50
Turkey	1,410	1,380	1,944	2,000	2,000
SUBTOTAL	2,086	2,037	2,703	2,766	2,761

FOOTNOTES AT END OF TABLE

CONTINUED

NOVEMBER 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 9 (Continued)

WORLD CENTRIFUGAL SUGAR PRODUCTION
1988/89 - 1991/92 1/

COUNTRY/REGION	1988/89	1989/90	1990/91 2/	Forecast 1991/92 Sept	Forecast 1991/92 Nov
	(1,000 Metric Tons)				
OTHER ASIA					
Afghanistan	10	10	10	10	10
Bangladesh	117	196	262	220	220
Burma (Myanmar)	40	35	25	50	30
China	5,312	5,618	6,648	7,000	7,000
India 6/	10,150	12,088	13,241	13,500	13,600
Indonesia	1,920	2,080	2,120	2,100	2,050
Japan	984	988	925	960	915
Malaysia	100	105	95	110	100
Nepal	30	35	40	17	45
Pakistan	1,980	1,987	2,067	2,300	2,080
Philippines	1,600	1,750	1,718	1,900	1,900
Sri Lanka	35	35	35	35	35
Taiwan	664	511	438	550	460
Thailand	4,055	3,502	3,954	4,000	4,400
Vietnam	400	450	500	500	500
SUBTOTAL	27,397	29,390	32,078	33,252	33,345
OCEANIA					
Australia	3,680	3,797	3,515	3,200	3,150
Fiji	363	461	420	430	430
Papua New Guinea	50	35	45	30	50
SUBTOTAL	4,093	4,293	3,980	3,660	3,630
WORLD TOTAL	105,609	108,270	112,992	113,234	112,625

1/ One-half of the crop years are on a September/August basis. Crop years for Southern Hemisphere countries begin prior to September. Factors for converting from refined to raw sugar are 1.087 for refined beet sugar and 1.07 for refined cane sugar.
2/ Preliminary.
3/ United States data include continental beet and cane and Hawaii cane sugar, but exclude Puerto Rico cane sugar which is listed separately.
4/ French data exclude production of cane sugar in Guadeloupe, Martinique, and Reunion which are listed separately.
5/ Includes all of former republics including Lithuania.
6/ Indian data include production of Khandsari sugar, a native type, semi-white centrifugal sugar. Estimated output of Khandsari sugar in thousand tons is as follows: 1989/90 - 336; 1990/91 - 398; 1991/92 - 400.

NOVEMBER 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 10

SUGARCANE AREA HARVESTED, YIELD AND PRODUCTION
BY
SELECTED SUGARCANE PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVEST	SUGAR CANE YIELD	SUGAR CANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	------1,000 MT---------		PERCENT	MT/HA
Argentina 2/						
1989/90	240	44.2	10,606	944	8.9	3.93
1990/91	265	47.2	12,500	1,240	9.9	4.68
1991/92 NOV	280	46.4	13,000	1,350	10.4	4.82
Australia						
1989/90	331	83.3	27,562	3,797	13.8	11.47
1990/91	340	73.9	25,140	3,515	14.0	10.34
1991/92 NOV	350	77.0	26,950	3,150	11.7	9.00
Brazil						
1989/90	1,210	60.3	73,000	7,793	10.7	6.44
1990/91	1,170	64.1	75,000	7,900	10.5	6.75
1991/92 NOV	1,220	61.5	75,000	8,520	11.4	6.98
China 2/						
1989/90	960	50.8	48,795	4,851	9.9	5.05
1990/91	1009	57.1	57,620	5,261	9.1	5.21
1991/92 NOV	1,050	57.1	60,000	5,500	9.2	5.24
Colombia						
1989/90	113	123.9	14,000	1,611	11.5	14.26
1990/91	117	122.9	14,375	1,602	11.1	13.69
1991/92 NOV	120	121.3	14,550	1,650	11.3	13.75
Cuba						
1989/90	1,350	51.9	70,000	8,000	11.4	5.93
1990/91	1,350	50.0	67,500	7,623	11.3	5.65
1991/92 NOV	1,400	46.4	65,000	7,300	11.2	5.21
Dominican Republic						
1989/90	206	33.8	6,960	632	9.1	3.07
1990/91	210	34.4	7,220	656	9.1	3.12
1991/92 NOV	212	34.9	7,400	670	9.1	3.16
Egypt 2/						
1989/90	91	95.6	8,700	887	10.2	9.75
1990/91	90	95.6	8,600	890	10.3	9.89
1991/92 NOV	88	95.5	8,400	875	10.4	9.94
Fiji						
1989/90	60	68.2	4,089	461	11.3	7.68
1990/91	60	67.0	4,020	420	10.4	7.00
1991/92 NOV	60	67.0	4,020	430	10.7	7.17
Guatemala						
1989/90	120	72.6	8,712	875	10.0	7.29
1990/91	120	81.6	9,797	1,015	10.4	8.46
1991/92 NOV	125	80.0	10,000	1,050	10.5	8.40

FOOTNOTES AT END OF TABLE

CONTINUED

NOVEMBER 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 10 (Continued)

SUGARCANE AREA HARVESTED, YIELD AND PRODUCTION
BY
SELECTED SUGARCANE PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVEST	SUGAR CANE YIELD	SUGAR CANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	------1,000 MT---------		PERCENT	MT/HA
India						
1989/90	1,750	66.7	116,700	12,088	10.4	6.91
1990/91	1,890	66.4	125,510	13,241	10.5	7.01
1991/92 NOV	1,960	64.0	125,500	13,600	10.8	6.94
Indonesia						
1989/90	340	79.0	26,850	2,080	7.7	6.12
1990/91	365	76.9	28,074	2,120	7.6	5.81
1991/92 NOV	380	75.8	28,800	2,050	7.1	5.39
Mauritius						
1989/90	80	75.0	6,000	602	10.0	7.53
1990/91	80	75.0	6,000	661	11.0	8.26
1991/92 NOV	80	75.0	6,000	625	10.4	7.81
Mexico						
1989/90	511	68.1	34,800	3,100	8.9	6.07
1990/91	530	67.9	36,000	3,600	10.0	6.79
1991/92 NOV	518	67.6	35,000	3,450	9.9	6.66
Pakistan 2/						
1989/90	496	41.3	20,500	1,957	9.5	3.95
1990/91	555	40.7	22,600	2,042	9.0	3.68
1991/92 NOV	560	42.1	23,600	2,050	8.7	3.66
Peru						
1989/90	45	135.6	6,100	620	10.2	13.78
1990/91	46	134.8	6,200	560	9.0	12.17
1991/92 NOV	46	130.4	6,000	600	10.0	13.04
Philippines						
1989/90	310	69.1	21,425	1,750	8.2	5.65
1990/91	305	61.0	18,600	1,718	9.2	5.63
1991/92 NOV	325	63.1	20,500	1,900	9.3	5.85
South Africa						
1989/90	272	68.5	18,636	2,289	12.3	8.42
1990/91	275	66.2	18,198	2,282	12.5	8.30
1991/92 NOV	270	70.2	18,950	2,330	12.3	8.63
Sudan						
1989/90	40	112.5	4,500	420	9.3	10.50
1990/91	50	100.0	5,000	480	9.6	9.60
1991/92 NOV	50	100.0	5,000	500	10.0	10.00
Swaziland						
1989/90	36	105.5	3,797	504	13.3	14.00
1990/91	37	104.1	3,850	527	13.7	14.24
1991/92 NOV	37	103.0	3,810	500	13.1	13.51

FOOTNOTES AT END OF TABLE CONTINUED

NOVEMBER 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 10 (Continued)

SUGARCANE AREA HARVESTED, YIELD AND PRODUCTION
BY
SELECTED SUGARCANE PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVEST	SUGAR CANE YIELD	SUGAR CANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	------1,000 MT---------		PERCENT	MT/HA
Taiwan						
1989/90	61	86.6	5,283	511	9.7	8.38
1990/91	56	75.4	4,220	438	10.4	7.82
1991/92 NOV	58	77.6	4,500	460	10.2	7.93
Thailand						
1989/90	688	48.8	33,560	3,502	10.4	5.09
1990/91	820	49.5	40,560	3,954	9.7	4.82
1991/92 NOV	850	51.8	44,000	4,400	10.0	5.18
U.S.(Hawaii) 4/						
1989/90	30	214.2	6,425	771	12.0	25.70
1990/91	29	204.5	5,931	675	11.4	23.28
1991/92 NOV	27	210.9	5,695	726	12.7	26.89
U.S.(Mainland) 2/						
1989/90	295	64.5	19,039	2,093	11.0	7.09
1990/91	265	68.3	18,087	2,119	11.7	8.00
1991/92 NOV	309	65.8	20,322	2,426	11.9	7.85
Venezuela						
1989/90	115	55.2	6,346	495	7.8	4.30
1990/91	102	64.7	6,600	515	7.8	5.05
1991/92 NOV	95	75.8	7,200	520	7.2	5.47
Zimbabwe						
1989/90	35	109.0	3,816	502	13.2	14.34
1990/91	35	71.4	2,500	350	14.0	10.00
1991/92 NOV	35	85.7	3,000	370	12.3	10.57
MAJOR CANE PRODUCERS						
1989/90	9,785	62.0	606,201	63,135	10.4	6.45
1990/91	10,171	61.9	629,702	65,404	10.4	6.43
1991/92 NOV	10,505	61.1	642,197	67,002	10.4	6.38
OTHERS						
1989/90	1,173	57.6	67,607	5,961	8.8	5.08
1990/91	1,206	58.3	70,363	6,288	8.9	5.21
1991/92 NOV	1,223	58.5	71,541	6,519	9.1	5.33
WORLD						
1989/90	10,958	61.5	673,808	69,096	10.3	6.31
1990/91	11,377	61.5	700,065	71,692	10.2	6.30
1991/92 NOV	11,728	60.9	713,738	73,521	10.3	6.27

1/ Refined cane sugar is converted to raw value by a factor of 1.07.
2/ Produces beet sugar as well as cane sugar. 3/ Includes Khandsari (native typ semi-white centrifugal sugar. 4/ Hawaiian cane is harvested once every 24 months, consequently yields per hectare are much higher than in countries where cane is harvested every year.

NOVEMBER 1991 PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 11

SUGARBEET AREA HARVESTED, YIELD AND PRODUCTION
BY
SELECTED SUGARBEET PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVEST	BEET YIELD	SUGAR BEET PRODUCTION	SUGAR RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	-----1,000 MT--------		PERCENT	MT/HA
Austria						
1989/90	47	56.2	2,641	457	17.3	9.72
1990/91	50	49.9	2,494	451	18.1	9.02
1991/92 NOV	51	52.9	2,700	490	18.1	9.61
Belgium_Luxembourg						
1989/90	111	59.8	6,640	1,039	15.6	9.36
1990/91	112	61.2	6,857	1,119	16.3	9.99
1991/92 NOV	107	52.1	5,570	885	15.9	8.27
China 2/						
1989/90	569	16.2	9,243	767	8.3	1.35
1990/91	670	21.7	14,525	1,387	9.5	2.07
1991/92 NOV	750	20.0	15,000	1,500	10.0	2.00
Czechoslovakia						
1989/90	182	35.1	6,389	878	13.7	4.82
1990/91	170	31.6	5,374	700	13.0	4.12
1991/92 NOV	170	36.5	6,200	850	13.7	5.00
Denmark						
1989/90	67	49.4	3,309	529	16.0	7.90
1990/91	66	55.8	3,685	591	16.0	8.95
1991/92 NOV	67	47.8	3,200	500	15.6	7.46
France						
1989/90	427	56.0	23,915	4,204	17.6	9.85
1990/91	474	53.8	25,520	4,744	18.6	10.01
1991/92 NOV	453	55.3	25,065	4,300	17.2	9.49
Germany						
1989/90	609	44.2	26,901	4,087	15.2	6.71
1990/91	619	49.0	30,310	4,672	15.4	7.55
1991/92 NOV	572	45.5	26,000	4,150	16.0	7.26
Hungary						
1989/90	115	38.3	4,400	630	14.3	5.48
1990/91	115	38.3	4,400	550	12.5	4.78
1991/92 NOV	115	43.5	5,000	650	13.0	5.65
Italy						
1989/90	290	57.2	16,600	1,880	11.3	6.48
1990/91	270	43.0	11,600	1,587	13.7	5.88
1991/92 NOV	280	42.9	12,000	1,650	13.8	5.89
Japan 2/						
1989/90	72	50.9	3,664	667	18.2	9.26
1990/91	72	55.5	3,994	700	17.5	9.72
1991/92 NOV	72	52.1	3,750	660	17.6	9.17
Netherlands						
1989/90	128	56.3	7,208	1,241	17.2	9.70
1990/91	125	69.7	8,707	1,339	15.4	10.71
1991/92 NOV	125	60.0	7,500	1,050	14.0	8.40

FOOTNOTES AT END OF TABLE

CONTINUED

NOVEMBER 1991 Production Estimates and Crop Assessment Division FAS, USDA

TABLE 11 (Continued)

SUGARBEET AREA HARVESTED, YIELD AND PRODUCTION
BY
SELECTED SUGARBEET PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVEST	BEET YIELD	SUGAR BEET PRODUCTION	SUGAR RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	-----1,000 MT--------		PERCENT	MT/HA
Poland						
1989/90	423	34.0	14,374	1,865	13.0	4.41
1990/91	440	38.0	16,721	2,174	13.0	4.94
1991/92 NOV	361	36.0	13,000	1,700	13.1	4.71
Romania						
1989/90	243	26.5	6,432	499	7.8	2.05
1990/91	155	20.1	3,114	334	10.7	2.15
1991/92 NOV	203	24.6	5,000	400	8.0	1.97
Spain 2/						
1989/90	160	44.8	7,172	1,023	14.3	6.39
1990/91	160	45.4	7,265	1,020	14.0	6.38
1991/92 NOV	150	46.0	6,900	970	14.1	6.47
Turkey						
1989/90	350	31.2	10,930	1,380	12.6	3.94
1990/91	378	37.0	13,986	1,944	13.9	5.14
1991/92 NOV	378	39.7	15,000	2,000	13.3	5.29
U.S.S.R.						
1989/90	3,344	29.1	97,414	9,530	9.8	2.85
1990/91	3,287	24.8	81,400	9,160	11.3	2.79
1991/92 NOV	3,154	23.8	75,000	8,700	11.6	2.76
United Kingdom						
1989/90	194	41.2	8,000	1,322	16.5	6.81
1990/91	192	41.7	8,000	1,360	17.0	7.08
1991/92 NOV	170	46.2	7,850	1,360	17.3	8.00
United States 2/						
1989/90	524	43.5	22,800	3,144	13.8	6.00
1990/91	557	44.9	24,982	3,493	14.0	6.27
1991/92 NOV	561	45.6	25,563	3,538	13.8	6.31
Yugoslavia						
1989/90	142	47.9	6,797	930	13.7	6.55
1990/91	158	37.4	5,915	885	15.0	5.60
1991/92 NOV	138	39.9	5,500	820	14.9	5.94
MAJOR BEET PRODUCERS						
1989/90	1,117	29.4	32,818	4,011	12.2	3.59
1990/91	1,257	32.2	40,417	5,000	12.4	3.98
1991/92 NOV	1,342	31.0	41,588	5,168	12.4	3.85
OTHERS						
1989/90	7,477	36.8	275,079	35,163	12.8	4.70
1990/91	7,413	35.3	261,812	36,300	13.9	4.90
1991/92 NOV	7,116	34.7	247,045	33,936	13.7	4.77
WORLD						
1989/90	8,594	35.8	307,897	39,174	12.7	4.56
1990/91	8,670	34.9	302,229	41,300	13.7	4.76
1991/92 NOV	8,458	34.1	288,633	39,104	13.5	4.62

1/ Refined beet sugar is converted to raw value by a forecast of 1.087.
2/ Produces cane sugar as well as beet sugar.

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WORLD PEANUT PRODUCTION

World peanut production in 1991/92 is estimated at 23.5 million tons, up 0.6 million or 3 percent from last year. This will be a record crop and over 0.2 million tons above the old record set during 1988/89. India, China, and the United States will account for 16.4 million tons or 70 percent of world output. Peanut crops in both India and the United States are expected to be up from 1990/91, by 1 and 37 percent, respectively. China's peanut crop is expected to be down 4 percent from last year. This year's peanut crop was slightly above the harvest of 1990/91 since the majority of the countries recovered from last year's poor growing conditions that were caused by dry weather or lack of adequate irrigation. This includes most countries that rely on peanut and peanut product exports for a significant portion of their foreign exchange and reserves. The accompanying tables of peanut area, yield, and production for 1980/81 through 1991/92 provide the official USDA estimates for countries worldwide.

INDIA

India ranks first in the world in both cultivated peanut area and production. The 1991/92 crop is forecast to improve slightly from last year's 8.1 million tons to an estimated 8.2 million. Harvested area in 1991/92 is forecast at a near record 8.7 million hectares. Peanuts are the key oilseed cultivated in India but experience wide fluctuation in annual production. Between 1980/81 and 1990/91, Indian peanut output increased 61 percent, while harvested area climbed 27 percent. The primary summer growing season was adversely affected by inadequate or untimely rains during 1991/92, causing poor yield prospects, particularly in Gujarat. Elsewhere, monsoon rainfall was typically beneficial and helped prevent additional large scale losses. Winter season peanuts are being sown at present and are typically irrigated. Slightly higher area and yield are forecast for this portion of the 1991/92 crop, owing to high market price incentives and favorable planting conditions.

CHINA

China is the world's second largest producer of peanuts after India. Although it has only about a third of India's peanut area, China's yields of 1.8-2.2 metric tons per hectare are twice as high. Peanut area in 1991 is unchanged from a year ago at 2.9 million hectares, but production is estimated at 6.1 million tons, down 4 percent from last year's near-record crop. Most of China's peanut areas experienced no major weather problems during the 1991 growing season.

Peanuts are grown widely throughout China, but production is concentrated in Shandong province, which accounts for more than 35 percent of the total crop. Peanuts are also a major crop in Henan and Hebei provinces on the North China Plain and Guangdong and Guangxi province in southern China. After rising steadily in the early 1980's, China's peanut area and production peaked in 1985/86 at 3.3 million hectares and 6.7 million tons, respectively. Despite a continuing strong demand for peanut products, area fell after 1985 because of competition for scarce farmland from cotton, grain, and other cash crops. The Chinese Government has taken several steps to encourage peanut production in recent years. In 1990, the government raised the state procurement price by about 25 percent to make peanuts more profitable relative to grain. It also supported production through investments in agricultural inputs, technology, and management.

INDONESIA

Indonesia is the world's fourth largest peanut producer, but accounts for only 3 percent of the world's total output. Harvested area during 1991/92 is estimated at 645,000 hectares and production is pegged at a record 920,000 tons, up 3 percent over last year. Peanuts are grown mainly on the islands of Java (70 percent) and Sumatra (14 percent). There is no active Indonesian Government program for peanuts as there is for other commodities such as rice and soybeans. The government's first priority in food production is aimed at maintaining rice self-sufficiency, with its second priority focused on soybeans. The government allocates limited credit to the farmers and they in turn prefer to use it for rice. Despite Indonesia's attempts to increase peanut production through research into improved varieties and inputs, average yields have remained stable. Production increases have come from a slow upward trend in area. Limited prime cropland is under significant pressure from alternative uses, including industrial and urban development.

ARGENTINA

Prospects for Argentina's 1991/92 peanut crop are good; however, yields are not expected to repeat last year's excellent harvest. This season's yield potential is only slightly less than the 1985/86-1989/90 average of 2.13 metric tons per hectare. Harvested area is estimated to be down 5 percent to 190,000 hectares. As a result, production is pegged at 400,000 tons, down 75,000 tons or 16 percent from last year. Cordoba province is the main growing area for peanuts and favorable returns last year made peanuts an attractive alternative crop for producers. Over the last 10 years there has been little stability in Argentine peanut area, with the maximum area at 233,000 hectares in 1986/87 and the minimum area at 125,000 hectares in 1982/83. Production levels have not been stable either, but a slight upward trend is evident if the 1988/89 drought-reduced year is ignored.

SENEGAL

Senegal is Africa's number one peanut producer. Peanut production during 1991/92 is estimated to increase to nearly 0.7 million tons, up 4 percent from last year. This season's growing conditions have not improved yield prospects much above last year's reduced level due to inadequate moisture levels. Area planted decreased significantly after 1980/81, when farmers in the northern growing region opted to plant millet. Since then, area has remained relatively stable.

THE GAMBIA

Peanut production in 1991/92 is estimated at 120,000 tons, up 60 percent from last year's crop. This season's yields are expected to recover somewhat from last year, but remain slightly below the 1985/86-1989/90 average of 1.29 metric tons per hectare. The entire country of The Gambia is located within the Senegal peanut basin. Approximately 25 percent of the Gambian peanut crop is sold in Senegal, where support prices are significantly higher.

SUDAN

Sudanese 1991/92 peanut production is estimated at 400,000 tons, up 23 percent from last year. Sudan's peanut crop is grown primarily in the traditional rainfed region, with additional production in the irrigated subsector. Yields are expected to recover to near normal, rebounding from last year's poor rainfall during the growing season in both producing regions. Since 1980/81, total peanut area has decreased 40 percent due to a decline in the traditional rainfed region. Peanuts grown in the irrigated regions along the Blue, White, and Main Niles are grown for both export and local consumption.

UNITED STATES

The National Agricultural Statistics Service (NASS) of the United States Department of Agriculture estimated 1991/92 U.S. peanut production up 37 percent from 1990/91 to a record 2.242 million tons. Harvested area is estimated at a record 795,000 hectares, up over 8 percent from 1990 and the largest since 1951. NASS reports favorable digging conditions offset much of the impact of dry weather on yields. The Southeastern States (Alabama, Florida, Georgia, and South Carolina), recovered from last season's drought stricken yields with production up 61 percent from 1990. Other important growing regions, such as Virginia, North Carolina, Oklahoma, and Texas are expected to achieve yields above last year.

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World Peanut Harvested Area (1,000 hectares)

	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92f
India	6,801	7,429	7,215	7,539	7,168	7,120	6,982	6,844	8,529	8,707	8,650	8,700
China	2,339	2,472	2,416	2,201	2,421	3,318	3,253	3,022	2,914	2,956	2,907	2,920
Senegal	1,064	1,080	1,121	937	874	607	808	846	903	784	915	900
United States	566	602	517	556	618	594	621	626	659	666	732	795
Nigeria	650	497	600	600	550	520	660	800	700	700	740	750
Indonesia	508	461	480	523	510	515	516	550	608	612	625	645
Burma	514	598	571	561	647	595	564	537	530	523	556	550
Zaire	480	496	510	524	524	524	524	530	530	530	530	530
Sudan	894	998	782	770	735	400	540	575	575	550	540	530
Cameroon	363	311	315	300	300	320	320	320	320	320	320	320
Vietnam	119	130	141	170	180	190	195	285	290	300	300	300
Burkina	140	140	140	140	140	180	230	230	250	230	220	225
Zimbabwe	240	255	192	151	133	153	202	211	208	193	201	204
Argentina	197	166	125	146	143	168	233	192	150	180	200	190
Ivory Coast	65	93	70	101	118	117	125	136	142	148	150	153
Mozambique	180	170	170	120	140	140	150	150	150	150	150	150
Uganda	110	120	120	120	124	124	130	115	140	145	140	140
Central African Rep	122	129	100	116	116	125	125	135	135	130	130	130
Guinea	127	130	130	130	130	130	130	130	130	130	130	130
Thailand	100	117	117	120	125	123	125	118	118	120	122	123
Malawi	250	250	260	146	145	136	176	150	130	48	70	120
Chad	101	101	101	101	101	101	115	115	120	115	115	115
Niger	169	150	140	159	140	100	100	100	130	110	110	110
Mali	97	97	97	97	97	97	97	110	115	100	110	100
Gambia	83	93	123	110	110	110	80	95	95	98	80	95
Brazil	235	235	210	150	190	161	142	102	89	83	90	90
South Africa	289	238	227	238	230	221	207	153	153	88	86	90
Zambia	34	22	31	30	32	33	70	80	62	80	80	90
Tanzania	94	95	96	98	98	98	98	98	100	100	100	90
Ghana	109	105	80	80	80	80	90	100	100	90	90	90
Mexico	40	47	45	45	40	43	45	90	85	85	85	85
Benin	75	75	75	75	75	80	80	80	85	85	80	80
Guinea-Bissau	80	80	80	80	80	80	80	80	85	80	80	80
Pakistan	47	60	69	72	58	55	63	67	68	80	72	75
Burundi	30	30	30	30	30	30	40	65	70	72	70	70
Philippines	39	56	48	46	47	50	45	50	50	46	46	48
Togo	45	45	45	45	45	45	45	45	45	45	45	45
Bangladesh	24	22	21	32	28	30	30	38	38	40	42	43
Taiwan	51	51	46	52	53	49	50	59	40	32	41	41
Paraguay	25	37	37	37	39	40	32	28	41	38	39	39
Madagascar	36	32	32	32	33	33	34	31	34	34	34	35
Morocco	28	32	36	23	25	24	21	21	34	35	37	30
Turkey	19	25	24	24	23	21	22	32	30	28	25	30
Australia	27	33	36	32	30	29	37	32	22	18	22	20
Japan	33	32	30	30	29	27	24	23	21	19	18	18
Korea, Republic of	12	10	11	12	10	12	13	22	16	17	12	15
Bolivia	15	15	7	14	15	14	14	14	14	14	14	14
Egypt	18	12	12	11	13	14	15	14	12	13	12	13
Syria	11	9	10	10	10	9	10	10	11	12	11	12
Dominican Republic	28	28	23	21	21	20	24	21	18	7	9	11
Venezuela	6	4	5	5	3	4	4	7	8	6	5	6
Malaysia	6	6	6	6	6	6	6	6	6	6	6	6
Ecuador	13	13	13	9	12	8	9	5	5	5	5	5
Others 1/	15	15	13	13	15	14	15	14	13	11	11	10
Total Area	17,763	18,549	17,951	17,790	17,659	17,837	18,366	18,309	19,926	19,814	20,010	20,206

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TABLE 13

World Peanut Yields (metric tons per hectare)

	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92f
Israel	5.20	4.29	4.40	4.40	4.40	4.60	4.60	4.20	4.75	5.00	6.67	6.67
Spain	2.50	2.50	2.00	2.00	2.00	2.50	3.00	3.00	4.00	4.00	4.00	4.00
United States	1.85	3.00	3.02	2.69	3.24	3.15	2.70	2.62	2.74	2.72	2.23	2.82
Korea, Republic of	2.08	2.40	2.46	2.42	2.60	2.67	3.08	2.46	3.00	2.82	2.42	2.80
Malaysia	2.33	2.33	2.33	2.33	2.33	2.33	2.33	2.33	2.33	2.33	2.50	2.50
Turkey	2.16	2.28	2.08	2.08	2.09	2.81	2.27	2.50	2.83	2.14	2.00	2.33
Venezuela	1.33	1.75	1.40	2.00	1.67	1.75	2.00	1.71	1.33	1.40	1.40	2.33
Egypt	1.83	1.92	2.00	1.82	2.69	2.64	2.67	3.00	3.08	2.23	2.17	2.31
Argentina	1.23	1.63	2.00	2.25	1.89	2.61	2.22	2.34	1.62	1.87	2.38	2.11
China	1.54	1.55	1.62	1.80	1.99	2.01	1.81	2.04	1.95	1.82	2.19	2.09
Syria	1.73	1.89	2.00	2.00	2.00	2.11	2.00	2.00	2.09	1.83	1.82	2.08
Soviet Union	1.00	1.00	1.00	1.00	2.00	2.00	3.00	2.00	2.00	2.00	2.00	2.00
Japan	1.67	1.91	1.57	1.63	1.76	1.89	1.96	2.00	1.52	1.95	2.22	1.94
Taiwan	1.61	1.63	1.37	1.67	1.68	1.57	1.66	1.70	1.85	1.81	1.90	1.90
Morocco	1.11	1.28	1.17	1.39	1.40	1.21	1.19	1.67	1.91	1.91	1.89	1.67
Brazil	1.32	1.30	1.19	1.47	1.77	1.34	1.37	1.67	1.75	1.65	1.67	1.67
South Africa	1.07	0.49	0.39	0.30	0.85	0.50	1.14	1.33	1.07	1.28	1.59	1.50
Australia	1.59	1.76	0.64	1.47	1.40	1.48	1.22	1.22	1.46	1.17	1.64	1.50
Indonesia	1.56	1.58	1.66	1.43	1.48	1.52	1.45	1.43	1.39	1.43	1.42	1.43
Thailand	1.29	1.26	1.24	1.23	1.38	1.40	1.35	1.37	1.39	1.34	1.33	1.33
Colombia	1.00	1.50	1.50	2.00	1.50	1.67	1.50	1.50	1.60	1.67	1.33	1.33
Gambia	0.72	1.17	1.23	1.03	1.09	1.14	1.38	1.26	1.32	1.33	0.94	1.26
Burundi	1.27	1.33	1.33	1.33	1.17	1.33	1.38	1.23	1.21	1.19	1.21	1.21
Bangladesh	1.00	1.05	1.10	1.03	1.14	1.13	1.13	1.26	1.18	1.18	1.19	1.21
Mexico	1.50	1.55	1.11	1.33	1.38	1.51	1.33	1.22	1.21	1.18	1.18	1.18
Bolivia	1.07	1.27	0.71	1.07	1.13	1.14	1.14	1.14	1.14	1.14	1.14	1.14
Central African Rep	1.01	0.97	1.28	0.99	1.12	1.12	1.12	1.04	1.11	1.08	1.08	1.12
Paraguay	1.00	0.97	1.00	1.00	1.08	1.00	1.25	1.25	0.61	1.08	0.90	1.03
Pakistan	1.21	1.20	1.22	1.22	1.19	1.15	1.19	0.78	1.15	1.03	1.14	1.01
Ecuador	0.85	0.77	0.85	0.89	0.83	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Dominican Republic	1.00	0.89	0.87	0.86	0.71	0.90	0.79	0.86	1.11	1.00	1.00	1.00
Madagascar	0.94	1.03	1.06	0.97	0.97	0.94	0.97	0.90	0.97	0.97	0.97	1.00
Vietnam	0.92	0.89	0.89	0.95	0.92	0.90	0.90	0.98	1.00	0.98	0.98	0.98
Ivory Coast	0.86	0.93	0.86	0.97	0.92	0.91	0.94	0.96	0.97	0.97	0.97	0.98
Mali	0.95	0.95	0.83	0.52	0.46	0.93	0.93	0.91	1.00	0.90	0.91	0.95
India	0.74	0.97	0.73	0.94	0.90	0.72	0.84	0.86	1.06	0.93	0.93	0.94
Burma	0.84	0.94	0.95	0.95	1.03	0.94	0.97	0.97	0.83	0.88	0.91	0.91
Benin	0.84	0.69	0.89	0.93	0.93	0.88	0.88	0.88	0.88	0.88	0.88	0.88
Philippines	0.77	0.88	0.75	0.91	0.89	0.88	0.91	0.80	0.76	0.76	0.80	0.79
Uganda	0.73	0.75	0.83	0.83	0.81	0.81	0.89	1.04	0.71	0.76	0.79	0.79
Togo	0.67	0.67	0.67	0.67	0.67	0.78	0.78	0.78	0.78	0.78	0.78	0.78
Senegal	0.49	0.81	0.99	0.61	0.64	0.97	1.01	1.10	0.76	1.04	0.73	0.77
Sudan	0.79	0.74	0.64	0.54	0.53	0.69	0.70	0.76	0.78	0.73	0.60	0.76
Ghana	0.41	0.40	0.43	0.45	0.45	0.63	0.67	0.70	0.80	0.78	0.78	0.72
Zaire	0.67	0.70	0.70	0.70	0.72	0.72	0.73	0.72	0.72	0.72	0.72	0.72
Chad	0.69	0.69	0.69	0.69	0.69	0.69	0.70	0.70	0.75	0.70	0.70	0.70
Burkina	0.50	0.55	0.55	0.57	0.50	0.71	0.70	0.64	0.72	0.70	0.68	0.69
Guinea	0.67	0.65	0.65	0.65	0.65	0.65	0.65	0.65	0.65	0.65	0.65	0.65
Tanzania	0.60	0.61	0.60	0.60	0.61	0.61	0.61	0.61	0.55	0.55	0.60	0.56
Niger	0.75	0.80	0.57	0.47	0.21	0.40	0.60	0.45	0.62	0.55	0.55	0.55
Nigeria	0.82	0.86	0.66	0.99	0.91	0.77	0.61	0.59	0.50	0.50	0.50	0.53
Uruguay	1.00	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50
Zimbabwe	0.54	0.45	0.17	0.27	0.51	0.48	0.25	0.37	0.44	0.49	0.47	0.47
Malawi	0.72	0.68	0.65	0.37	0.38	0.46	0.50	0.37	0.22	0.40	0.49	0.47
Mozambique	0.50	0.47	0.47	0.54	0.46	0.46	0.47	0.47	0.47	0.47	0.47	0.47
Zambia	0.59	0.59	0.36	0.43	0.47	0.55	0.43	0.44	0.45	0.31	0.44	0.44
Cameroon	0.30	0.28	0.29	0.40	0.37	0.44	0.44	0.44	0.45	0.44	0.44	0.44
Guinea-Bissau	0.25	0.38	0.38	0.28	0.38	0.38	0.38	0.38	0.41	0.38	0.38	0.38

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TABLE 14

World Peanut Production (1,000 metric tons)

	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92f
India	5,005	7,223	5,282	7,086	6,436	5,120	5,875	5,854	9,000	8,088	8,080	8,200
China	3,600	3,826	3,916	3,951	4,815	6,664	5,882	6,170	5,693	5,365	6,368	6,100
United States	1,045	1,806	1,560	1,495	1,999	1,870	1,677	1,640	1,806	1,810	1,634	2,242
Indonesia	791	728	795	747	755	780	750	786	843	875	890	920
Senegal	521	878	1,109	568	560	587	817	932	690	815	670	695
Burma	431	564	541	532	667	560	544	519	438	459	505	500
Nigeria	530	428	396	591	500	400	400	475	350	350	370	400
Argentina	243	270	250	329	270	439	518	450	243	336	475	400
Sudan	707	740	497	413	390	275	380	435	450	400	325	400
Zaire	320	347	357	367	375	375	380	380	380	380	380	380
Vietnam	110	116	126	162	165	170	175	280	290	295	295	295
Thailand	129	147	145	147	172	172	169	162	164	161	162	164
Burkina	70	77	77	80	70	128	160	146	180	160	150	155
Brazil	310	305	250	220	337	216	195	170	156	137	150	150
Ivory Coast	56	86	60	98	108	106	118	130	137	144	146	150
Central African Rep	123	125	128	115	130	140	140	140	150	140	140	145
Cameroon	110	87	90	120	110	140	140	140	145	140	140	140
South Africa	309	116	89	72	196	111	235	204	163	113	137	135
Gambia	60	109	151	113	120	125	110	120	125	130	75	120
Uganda	80	90	100	100	100	100	115	120	100	110	110	110
Mexico	60	73	50	60	55	65	60	110	103	100	100	100
Zimbabwe	130	115	32	41	68	73	51	79	91	95	94	96
Mali	92	92	80	50	45	90	90	100	115	90	100	95
Guinea	85	85	85	85	85	85	85	85	85	85	85	85
Burundi	38	40	40	40	35	40	55	80	85	86	85	85
Chad	70	70	70	70	70	70	80	80	90	80	80	80
Taiwan	82	83	63	87	89	77	83	100	74	58	78	78
Pakistan	57	72	84	88	69	63	75	52	78	82	82	76
Benin	63	52	67	70	70	70	70	70	75	75	70	70
Mozambique	90	80	80	65	65	65	70	70	70	70	70	70
Turkey	41	57	50	50	48	59	50	80	85	60	50	70
Ghana	45	42	34	36	36	50	60	70	80	70	70	65
Niger	126	120	80	74	30	40	60	45	80	60	60	60
Malawi	180	170	170	54	55	62	88	55	28	19	34	56
Bangladesh	24	23	23	33	32	34	34	48	45	47	50	52
Tanzania	56	58	58	59	60	60	60	60	55	55	60	50
Morocco	31	41	42	32	35	29	25	35	65	67	70	50
Korea, Republic of	25	24	27	29	26	32	40	54	48	48	29	42
Zambia	20	13	11	13	15	18	30	35	28	25	35	40
Paraguay	25	36	37	37	42	40	40	35	25	41	35	40
Philippines	30	49	36	42	42	44	41	40	38	35	37	38
Japan	55	61	47	49	51	51	47	46	32	37	40	35
Togo	30	30	30	30	30	35	35	35	35	35	35	35
Madagascar	34	33	34	31	32	31	33	28	33	33	33	35
Egypt	33	23	24	20	35	37	40	42	37	29	26	30
Australia	43	58	23	47	42	43	45	39	32	21	36	30
Guinea-Bissau	20	30	30	22	30	30	30	30	35	30	30	30
Syria	19	17	20	20	20	19	20	20	23	22	20	25
Israel	26	30	22	22	22	23	23	21	19	20	20	20
Bolivia	16	19	5	15	17	16	16	16	16	16	16	16
Malaysia	14	14	14	14	14	14	14	14	14	14	15	15
Venezuela	8	7	7	10	5	7	8	12	17	14	10	14
Dominican Republic	28	25	20	18	15	18	19	18	20	7	9	11
Ecuador	11	10	11	8	10	8	9	5	5	5	5	5
Others 1/	14	12	10	11	14	14	17	16	16	13	12	11
Total	16,271	19,832	17,435	18,738	19,684	19,990	20,383	20,978	23,280	22,052	22,883	23,511

1/ Peanut production or area harvested is estimated to be less than 5,000 tons or hectares during 1991/92.

November 1991

Production Estimates & Crop Assessment Division, FAS, USDA

WORLD PISTACHIO PRODUCTION

The world's leading commercial producers, other than Iran, of pistachio nuts are expected to harvest a combined 1991/92 crop of 89,900 tons (in-shell basis), marginally below the 1990/91 level. With pistachios, the most significant determinants of annual crop size are the alternate bearing factor, weather conditions, and bearing tree numbers. The 1991/92 season is an off-year in the bearing cycle for the United States. The U.S. crop is forecast at 21,800 tons, 59 percent smaller than last year's record harvest, but potentially the largest off-year crop to date, primarily because good weather conditions moderated the impact of the alternate bearing factor. U.S. nut sizes are reportedly large and kernal quality excellent. Even though it is also an off-year in Syria, the 1991/92 crop is expected to total a record 22,000 tons, due to a 17 percent increase in bearing tree numbers, improvements in cultivation techniques, and strong producer prices.

Current assessments indicate pistachio production in Turkey during the 1991/92 season will reach an all-time high of 40,000 tons, nearly 3 times larger than last year's off-year crop, and 14 percent above the previous record set in 1989/90. Significant factors contributing to the increase are highly favorable growing conditions and the coming into bearing of an additional 500,000 trees. Italy's 1991/92 harvest is forecast at 4,000 tons, 21 percent above the previous on-year crop in 1989/90. Among commercial pistachio producers, Italian crops exhibit the most pronounced cyclical fluctuation. Traditional cultivation practices call for growers to radically prune trees in the spring of every off-year in order to boost production during on-years. The long-term production outlook is for minimal growth with future crops ranging from off-year lows of 300 tons, to an occasional on-year high of 4,500 tons--equal to the record crop harvested during the 1981/82 season. Reportedly, the Greek pistachio crop was adversely affected by heavy rainfall that caused widespread disease problems and significantly reduced kernel quality. What should have been a bumper on-year crop is currently forecast at only 2,100 tons, down 19 percent from a year ago and 57 percent below the previous on-year crop in 1989/90 that totaled a record 4,900 tons.

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TABLE 15

WORLD PISTACHIO PRODUCTION
(1,000 Metric Tons/In-shell Basis)

	1987/88	1988/89	1989/90	1990/91	1991/92 1/
Greece	4.0	3.0	4.9	2.6	2.1
Italy	4.0	0.3	3.3	0.3	4.0
Syria	12.5	17.9	15.8	20.0	22.0
Turkey	25.0	15.0	35.0	14.0	40.0
United States	15.0	42.6	17.7	53.5	21.8
TOTAL	60.5	78.8	76.7	90.4	89.9

NOTE: Iran is excluded from this report due to lack of current, verifiable information.

1/ Preliminary.

November 1991 Production Estimates And Crop Assessment Division, FAS, USDA

WORLD WALNUT PRODUCTION

World commercial production of walnuts during the 1991/92 season is forecast at 485,800 tons (in-shell basis), marginally above the 1990/91 level. A record crop of 226,800 tons is anticipated in the United States due to an exceptionally high nut set. In China, production is expected to increase by 2 percent to 152,500 tons--a disappointing recovery in view of the significant production increases recorded during the last half of the 1980's. Extremely dry weather in two of the largest producing provinces, Shanxi and Shaanxi, reduced production potential but, reportedly, had little impact on quality. Walnut production in Turkey is forecast at 66,000 tons, up 1,000 tons from last season, but significantly below the 100,000 ton crops prevalent during the 1970's. The Turkish walnut industry has been in a state of decline for nearly 15 years. During the mid-1980's, high domestic prices for walnut lumber encouraged tree fellings. In most years, removals exceeded plantings. However, in 1989, lumber prices plummeted while nut prices rebounded to very attractive levels. Removals slowed and plantings resumed. Since 1989, the outlook has brightened due to steady growth in crop levels and both non-bearing and total tree numbers.

Significantly smaller walnut crops are forecast for France, India, and Italy during the 1991/92 season. French walnut production is forecast at 11,500 tons, 53 percent below a year ago, due to severe frost damage. Production in the southwest Bordeaux/Perigueux region is projected at 2,000 tons, down from a normal crop of about 15,000 tons. The Grenoble region in the southeast sustained less freeze damage and is expected to harvest a 1991/92 crop of 8,500 tons compared to approximately 10,000 tons in a more normal year. An unusually cold winter, followed by unseasonally dry weather during the bloom and fruit formation stages, is expected to reduce walnut output in India by 15 percent. Production for 1991/92 is forecast at 17,000 tons, down 3,000 from a year ago. Walnut production in Italy is forecast at 12,000 tons, 33 percent smaller than the previous two crops. Excessive rains and unseasonably cold temperatures precipitated widespread outbreaks of fungal diseases causing heavy losses and quality problems in most orchards. Nuts harvested from orchards that escaped damage are reportedly of good quality.

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TABLE 16

WORLD WALNUT PRODUCTION
(1,000 Metric Tons - In-shell Basis)

	1987/88	1988/89	1989/90	1990/91	1991/92 1/
China	147.2	177.1	160.1	149.6	152.5
France	26.5	22.8	25.8	24.6	11.5
India	20.0	18.0	17.0	20.0	17.0
Italy	20.0	11.0	18.0	18.0	12.0
Turkey	65.0	64.0	64.0	65.0	66.0
United States	224.1	189.6	207.8	205.9	226.8
TOTAL	502.8	482.5	492.7	483.1	485.8

1/ Preliminary.

November 1991 Production Estimates And Crop Assessment Division, FAS, USDA

WORLD DRIED PRUNE PRODUCTION

Northern Hemisphere production of dried prunes during the 1991/92 season is forecast at 200,460 tons (packed weight basis), up 10 percent from a year ago. The increase reflects projections of a significantly larger pack in the United States where growing, harvesting, and drying conditions were reportedly conducive to producing a good quality pack of 171,460 tons.

Dried prune production in France is forecast at 25,000 tons, down nearly one-third from last season, primarily due to freezing temperatures during the April blossoming period. Abnormally cold, wet weather during May, and excessive dryness during August, further reduced yields. Overall, the quality of the 1991/92 pack is good, but, because of the August drought, average fruit sizes are reportedly smaller. The bulk of the pack is expected to fall in the "medium" size category of 66-68 fruits per 550 grams, instead of the 60 fruit per 500 gram category characteristic of a more normal year.

Dried prune production in Yugoslavia continues to trend downward. The 1991/92 pack is expected to total only 4,000 tons, down 24 percent from a year ago, and potentially the smallest produced since the 1955/56 pack of 1,370 tons. The projected downturn this season reflects: a shortage of fresh plums for drying due to weather damage and disease problems; the continuing diversion of fresh plums for brandy production because of higher prices; severe fuel shortages in Sebia and the two major producing provinces of Bosnia and Herzegovina; an overvalued currency that makes export prices too low to cover production costs; and, poor export prospects due to continuing trade problems with the Soviet Union. No turnaround in the situation is anticipated in the near future.

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TABLE 17

WORLD PRODUCTION OF DRIED PRUNES
(Metric Tons-Packed Weight Basis)

	1989/90	1990/91	1991/92 1/
NORTHERN HEMISPHERE			
France	19,949	36,745	25,000
Yugoslavia	12,148	5,239	4,000
United States	215,275	140,025	171,460
Total	247,372	182,009	200,460
SOUTHERN HEMISPHERE			
Argentina 2/	8,000	9,000	N/A
Australia 2/	2,700	2,800	N/A
Chile 2/	13,800	11,500	N/A
South Africa 3/	3,512	2,120	N/A
Total	28,012	25,420	N/A
WORLD TOTAL	275,384	207,429	N/A

1/ Preliminary.
2/ Estimate as of May 1991.
3/ Revised November 1991.

November 1991 Production Estimates and Crop Assessment Division, FAS, USDA

CHINESE FEED AND LIVESTOCK OUTLOOK

A technical exchange team, led by a USDA specialist, traveled to China during late August and early September. The trip was made under the auspices of the U.S./China Scientific and Technical Exchange Program. The team's objective was to gather information on China's livestock production, including structure, marketing, prices, polices, feed use, etc., that would provide a basis for anticipating likely development during the 1990's. The team's itinerary included stops in Beijing, Huhhot, Nanjing, Shouzhou, Shanghai, Guangzhou, and Sengzheng. Appointments included talks with government officials at the national, provincial, and county levels and visits to research institutes, livestock production units, and feed mills.

This report summarizes team findings and implication of those findings. Since the information received by the team was neither complete nor fully harmonious, there was considerable need for interpretation. In presenting implications, the approach of this report is to bracket likely developments by the mid-1990's rather than attempt to develop precise projections. The following table details recent development of China's livestock and commercial feed sector.

CHINA: OUTPUT OF LIVESTOCK PRODUCTS AND MANUFACTURED FEED
(million metric tons)

	Beef	Pork	Sheep & Goat Meat	Poultry Meat	Eggs	Milk	Manufactured Feed 1/
1986	0.59	17.96	0.62	1.88	5.55	2.86	18.00
1987	0.79	18.35	0.72	2.04	5.90	3.30	22.51
1988	0.96	20.18	0.80	2.74	6.96	3.66	29.57
1989	1.07	21.23	0.96	2.84	7.20	3.81	31.00
1990	1.26	22.81	1.07	3.32	7.95	4.13	31.00
1991 2/	1.43	23.30	1.15	3.60	8.55	4.40	NA

Source: All data are published USDA/FAS estimates except manufactured feed which was published by ERS.

NA. Not available.
1/ Data do not cover small mills. The estimate for 1990 was obtained by the team.
2/ Forecast.

Probably the most important factor affecting the development of the feed and livestock industries is the pace of price reform. Wherever price reform was mentioned, Chinese contacts said that the process would continue. Most contacts, both government and private, asserted that within 10 years all prices in the feed-livestock complex would be market prices. However, discussion as to what current price levels are, how price information flows, and what changes are expected under a system of market prices usually were very inconclusive. Some contacts said that they use Shanghai wholesale prices while others said there were regular price publications; however, no copies were available for the team.

In addition to the apparent lack of price information, Chinese feed mill managers demonstrated considerably less sensitivity to prices and price changes compared to managers in western countries. All feed mill managers visited said they rarely change feed mixtures to reflect changes in ingredient prices. There is, of course, less incentive to change mixtures because profit percentages and some ingredient prices are under government "guidance" which discourages flexibility.

The outlook for pork, the most important livestock enterprise in China, is blurred by inconsistencies in the system of subsidies used by the national, provincial, county, and township level governments. Although there is supposed to be fairly uniform national programs in operation, it seemed that many local and provincial governmental units have reserved for themselves some rights to add or subtract from the subsidies. Thus, the stated national policy to slow expansion of the hog industry in favor of poultry production is being partially frustrated by city plans to ensure pork for their residents and by township and county plans to spur or retard certain types of economic development.

The hog industry seems likely to continue expanding at near historical rates, i.e., expansion of half to 1 million tons of pork per year for the next 4 or 5 years. Structural changes relative to the way hogs are raised will likely include more private commercial raisers, mostly farmers who fatten 50 or more pigs per cycle. There will continue to be a shift to western breeds or to cross breeds with a higher percentage of western genetics. Large litter sizes are the major feature of Chinese breeds that breeding farms are attempting to retain. Western breeds offer faster, more efficient growth for the producer and leaner meat for the consumer. A shift to western breeds will bring an increase in feed efficiency, allowing some expansion of pork output without a commensurate increase in feed input.

The major uncertainty in the outlook for the hog sector is what will happen when China switches to free market prices for both hogs and feeds. Currently, pork is produced by a wide variety of farm sizes and ownership patterns. The team heard claims that the large (commercial) State farms lose money even in the best of years. The small sample of private farms visited seemed to prefer selling to the State buying agency. Also, at various locations, aspects of the system of State buying of pork at set prices, (generally below what was called the free market price) and of State subsidies on feed were discussed, but the team was never given a complete detailed explanation of how the system operates. It is likely that one detailed explanation would not have been useful anyway because, as mentioned, each governmental level seems to have some say as to when and how much subsidies are paid. In any case, the team was told that in every region, some portion of production is at negotiated or free market prices for both the feed used and the pork produced. Thus, it seems likely that although a switch to free market prices for hogs and feed will involve some new price relationships between feed and pork and between pork and other meats, continued strong demand growth will override any temporary imbalances that develop.

Poultry meat production is likely to expand rapidly but not at explosive rates as some have predicted and as some in the Chinese Government would like to see. Output of western type broilers has grown rapidly in the past few years but Chinese analysts said most of these broilers are either for export or for tourist hotels. Several analysts said the general populace has not accepted western style broilers and still prefers "native" chicken meat which sells for prices that are 50 percent or more above those of western type broilers. Poultry meat expansion is likely to average 300,000 to 500,000 tons per year, somewhat above historical rates, due to growing demand and government incentives to production. However, unless consumer tastes change rapidly, the mix between native and western breeds is likely to show little change. This implies that a rapid increase in feed efficiency is unlikely.

The beef sector should continue to expand at historical rates despite the potential to use concentrate feed and sharply increase beef production without expanding the cow herd. Discussions about this possibility (with one exception) were never met with any enthusiasm, but were rebutted with talk about poor economics and the difficulty of changing traditional patterns of production. As if to prove the point, both dairy farms visited sell all their male calves to drug manufacturing firms rather than to feeders. Dairy farms in northeastern China were said to sell their surplus calves to feeders. With slow expansion of beef production and the ability of beef to utilize a wide range of non-concentrates, it seems unlikely that growth in beef production will have a significant impact on feed demand during the next 4 to 5 years.

Before 1990, milk production had shown one of the fastest growth rates within the livestock sector. However, slower growth characterized 1990 and early 1991. Discussions with Chinese officials seemed to confirm that growth in demand for milk has slowed and may not go back to the previous rapid rates of expansion. Future growth in milk demand will depend on price and income relationships rather than expanding distribution to under-served areas as was partially the case before 1990. On the other hand, compared to many other countries, per capita consumption in China is still very low. Thus, improved incomes may continue to generate significant increases in milk demand. In addition, production and consumption of dairy products are very low and could be another source of strong demand for milk.

Egg production, like dairy production, could expand at a more moderate pace in the near future. Consumption, estimated at over 150 eggs per capita, is approaching the level of Taiwan and South Korea, signifying that demand growth might soon start to slow. On the other hand, production growth has been very strong during the past 5 years. Eggs are produced in significant quantities by both backyard operators and commercially sized State and private farms. Therefore, unless free market prices involve a greatly different feed/egg price relationship, egg production trends probably will not be significantly affected when China switches to free market prices.

The outlook for the manufactured feed industry is difficult to project due, in part, to the lack of reliable data on the present situation. In asking about the size of the industry the team received several different estimates of 1990 production. The most common answer seemed to be that in 1990, 6,200 feed plants (with more than 1 ton per hour capacity) produced 31 million tons of feed. Later discussions indicated that this total includes compound feeds, pre-mixes, concentrates, and simple mixtures. In addition, there were some estimates that the smaller feed mills (less than 1 ton per hour capacity)

produced 9 million tons, bringing China's 1990 total to 40 million tons. Feed milling capacity was listed at 50 million tons for the 6,200 larger mills. Several years ago, plans were announced for future expansion of milling capacity to 60 million tons in 1995 and 100 million ton in the year 2000. On this trip, Ministry of Commerce Officials (who control most of the milling capacity) said they expect capacity to expand 7 to 9 percent a year during the next 5 years. That indicates that rather than 10 million tons of new capacity as suggested by the older plan, there might be an additional 20 or 25 million tons by 1995. Neither government officials nor feed mill operators thought that the physical availability of ingredients would be a serious problem during the next 5 years. However, both sources did mention that there have been some jurisdictional problems with buying from other provinces.

Developments in 1990 and 1991 add another element of uncertainty to the outlook for the manufactured feed sector. At the national level, the team was told that feed demand is very strong with implications that 1990 production was up and 1991 output also will be up. However, the team's limited survey at the provincial and subprovincial level indicated that production was down in 1990 and that 1991 production is expected to be about the same level. Explanations given for the decline usually included 2 factors--weak prices for hogs and expanded use of pre-mixes by individual farmers. Detracting from the first reason is the fact that, low prices or not, pork production was up 7 percent in 1990 and a further 2 percent increase is expected in 1991. Output of poultry meat and eggs were each up 13 percent in 1990, with further significant growth forecast for 1991.

With the foregoing introduction and qualifications, the outlook for the feed industry and the use of grain and high protein meal by that industry can be estimated in two ways. In the macro sense, if capacity increases about 25 million tons (8 percent per year), production stays at 60 percent of capacity, grain use continues to account for about 60 percent of feed ingredients, and high protein meals 20 percent, then 1995 feed production will increase 15 million tons from the 1990 levels. This would require an additional 9 million tons of grain and 3 million tons of high-protein meals. This probably represents a near minimum of likely outcomes because it essentially assumes that the commercial feed industry develops at historical rates of physical growth and does not significantly increase its share of the total feed market. Most Chinese contacts indicated that an increased share for the commercial feed sector was both likely and a desirable policy goal.

If likely animal production developments based on recent trends are used to estimate feed demand and the commercial feed industry provides for half the increase, then the outcome is much larger. However, during the last 5 years, growth in most livestock sectors has been extremely rapid and projected feed use based on these growth rates probably should be viewed as a near maximum of likely outcomes.

With continued patterns of growth in livestock, additional feed use can be estimated as follows. In the pork sector, a 3 million ton increase in meat production translates to a near 5 million ton increase in live weight production. If half the additional pork is dependent on the commercial feed industry, then (with an efficient 4 to 1 conversion ratio) an additional 10 million tons of manufactured feed are needed. For poultry meat, a production increase of 2 million tons by 1995 means a live weight increase of almost 3

million tons. Assuming half of that increase depends on the commercial feed industry, and a relatively poor 3 to 1 conversion ratio due to the continued proportion of native breeds, then 4-5 million more tons of feed are needed for poultry meat production. Egg production increasing at about half a million tons per year and feed conversion around 3 million would mean that an additional 3-4 million tons of feed were needed by the egg sector. Thus an additional 7-9 million tons of commercially mixed feed would be required for poultry meat and egg production. Continued rapid growth in aquacultural production and further expansion in dairy output could create demand for another 4-5 million tons of commercial feed by 1995.

Summarizing, the above calculations indicate that under certain conditions, rapid increases in livestock output could require an additional 22 million tons of manufactured feed by 1995, which in turn would require an additional 13 million tons of grain and 4-5 million tons of high protein meals. These totals are approximately 50 percent larger than the feed production and ingredient use levels implicit in the government's plans for 7-9 percent growth in feed milling capacity. As a consequence, if rapid increases in livestock production are to continue, faster development of the feed industry and new sources of feed ingredients may be needed.

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WORLD COTTON PRODUCTION

World cotton production for 1991/92 is projected at 91.6 million bales, well above the 87.0 million of last year. About 87 percent of the increase in cotton output is estimated to come from the world's two top producers: China and the United States. This article will highlight the top seven producing nations: China, United States, Soviet Union, India, Pakistan, Brazil, and Turkey. Countries were ranked based on estimated production data for 1991/92. Each country produces in excess of 2.5 million 480-pound bales annually. Together, they will produce an estimated 75.2 million bales, or 82 percent of the world's cotton.

China, the largest cotton producer in the world, grows almost a quarter of the global output. Production for 1991/92 is estimated at 22.0 million bales with yields well above the world average. Cotton area is estimated at 6.0 million hectares, an increase of 7 percent over 1990/91. About 60 percent of China's cotton is grown in the North China Plain, especially in Shandong, Henan, and Hebei provinces. The remainder of the crop is grown in the northwest and the Yangtze River Valley, where yields are higher than in the north because of a longer growing season. In early July, serious flooding in the Yangtze and Huai River Valley caused significant cotton losses in Hubei province and moderate losses in Henan, Anhui, and Jiangus provinces. Despite the flood damage, good yields are still expected because of favorable summer weather in the North China Plain and Northwest cotton areas, additional inputs, and better management. Warm, dry weather since September in most cotton areas has boosted the quantity and quality of the 1991/92 crop.

The United States is currently the second largest cotton producer in the world. Production for 1991/92 is estimated at a near-record level of 18.2 million bales, up 18 percent from last year. The United States was the world's leader in cotton output prior to 1983/84. Since then it has been consistently surpassed by China, but has distanced itself from the Soviet Union for the number two position. Over the past 5 years, the United States annual production averaged 13.5 million bales. The 1991/92 season commenced with a drought in California and wet conditions in the South. As the season progressed, growing conditions improved. Cold, wet weather during late October and early November delayed harvest and deteriorated cotton quality across the Mississippi Delta. Mostly clear weather favored quality and harvesting across the Texas Plains, the southwest states, and the southeast.

The Soviet Union ranks behind China and the United States in cotton production. Production for 1991/92 in the USSR is estimated at 11.0 million bales, down more than 8 percent from last year. Cotton is grown only under irrigation in five Soviet republics of Central Asia--Uzbekistan, Turkmenistan, Tadzhikistan, Kazakhstan, and Kirgzia--and in Azerbaidzhan of the Transcaucasian region. Historically, Uzbekistan has accounted for approximately two-thirds of the total Soviet output. The area planted to cotton is around 3.0 million hectares, down 5 percent from last year as food and feed crops were planted in the place of cotton. The increase in the production of food and feed crops is necessary to enhance local food supplies and improve soil and water conservation practices. Efforts are being made to offset the drop in cotton area through improvement of yields.

India is currently the fourth largest producer of cotton in the world. The 1991/92 output is estimated at 10.0 million bales, up 865,000 bales from last year's disappointing harvest. It has the largest area planted to cotton, amounting to roughly 21 percent of the world total. Yields are among the world's lowest, estimated at only 298 kilograms per hectare. Because of this, India will contribute just 11 percent of world lint output this year. The summer monsoon plays a key role in cotton productivity and crop size in most growing areas, since only 20 percent of the total area is under irrigation. The 1991/92 monsoon season has been mixed, but generally favorable for the current cotton crop. Rainfall deficiencies have occurred in important growing areas of Gujarat and Maharashtra but reports elsewhere indicate excellent crop conditions.

Pakistan is currently the fifth largest producer of cotton in the world. Production is expected to be a record 7.8 million bales in 1991/92. This will account for 9 percent of the world's cotton. The Pakistani cotton crop is well insulated from rainfall deficiencies, with nearly all cotton acreage in the vast Indus River Plain under irrigation. Its irrigation resources have enabled the country to achieve more than double the average cotton yield of neighboring India, with 1991/92 yields forecast at 612 kilograms per hectare. Pakistan is cultivating a record cotton area this season, at an estimated level of 2.8 million hectares.

Brazil is currently the sixth largest cotton producer in the world and the largest producer in South America. Cotton production in 1991/92 is forecast to reach 3.5 million bales, 13 percent above last year. Area is currently forecast at 2.0 million hectares, slightly larger than last year. The area devoted to cotton is almost entirely determined by the relative price of competing crops and the amount of credit made available by the government. The Government of Brazil announced on October 10 a new production credit measure intended to encourage producers to increase planted area and input utilization. Some debate exists over what impact the government's recently announced agricultural policy package will have on planted area this year. Dry conditions are creating some delays in land preparation and cotton planting progress is behind normal in the principal producing states of Parana and Sao Paulo. Continued dry conditions could cause some land to shift from cotton to corn or soybeans.

Turkey is the seventh largest cotton producer in the world, producing 3 percent of the world's total. The cotton growing areas are Cukurova and Southeast Anatolia, the Aegean region in Western Anatolia, and Antalya, located in Southern Anatolia. Cotton production for 1991/92 is estimated at 2.7 million bales, slightly below the record production of last year. Area is estimated to decrease 4 percent while the yield is expected to decrease 6 percent. Rains in early June delayed planting and necessitated some replanting. This delayed crop maturity pushed the harvest into the fall where rains in late September and early October hampered harvest operation.

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TABLE 18

MAJOR COTTON PRODUCERS

1991/92	480-lb BALES (1,000)	PERCENT OF PRODUCTION	YIELD (Kg/Ha)	AREA HARVESTED (1,000 Ha)	PERCENT OF AREA	LINT THOUS. MT
WORLD	91,587	100	583	34,205	100	19,941
TOP SEVEN	75,215	82	603	27,155	79	16,376
China	22,000	24	798	6,000	18	4,790
United States	18,215	20	727	5,455	16	3,966
USSR	11,000	12	796	3,010	9	2,395
India	10,000	11	298	7,300	21	2,177
Pakistan	7,800	9	612	2,775	8	1,698
Brazil	3,500	4	381	2,000	6	762
Turkey	2,700	3	956	615	2	588
Other	16,372	18	506	7,050	21	3,565
1990/91						
WORLD	86,958	100	573	33,055	100	18,933
TOP SEVEN	70,941	82	590	26,162	79	15,446
China	20,700	24	807	5,588	17	4,507
United States	15,499	18	711	4,748	14	3,375
USSR	12,000	14	827	3,160	10	2,613
India	9,135	11	270	7,355	22	1,989
Pakistan	7,513	9	607	2,693	8	1,636
Brazil	3,087	4	340	1,977	6	672
Turkey	3,007	3	1,021	641	2	655
Other	16,017	18	506	6,893	21	3,487

CHANGE FROM 1990/91

	480-lb BALES (1,000)	CHANGE FROM YEAR EARLIER (PERCENT)	SHARE OF CHANGE (PERCENT)	AREA HARVESTED (1,000 Ha)	CHANGE FROM YEAR EARLIER (PERCENT)	SHARE OF CHANGE (PERCENT)
WORLD	4,629	5	100	1,150	3	100
TOP SEVEN	4,274	6	92	993	4	86
China	1,300	6	28	412	7	36
United States	2,716	18	59	707	15	61
USSR	-1,000	-8	-22	-150	-5	-13
India	865	9	19	-55	-1	-5
Pakistan	287	4	6	82	3	7
Brazil	413	13	9	23	1	2
Turkey	-307	-10	-7	-26	-4	-2
Other	355	2	8	157	2	14

WORLD RAISIN/SULTANA PRODUCTION

The 1991/92 raisin/sultana pack in the major Northern Hemisphere countries is forecast at 455,990 tons (packed weight basis), 14 percent below the 1990/91 level, due to smaller than anticipated output in the United States, Turkey, and Mexico. The U.S. pack is forecast at 266,990 tons, down 20 percent from a year ago. The decline can be attributed to a series of weather anomalies in California's major growing areas that adversely affected the grape crop. Late season rains damaged blossoms, below-normal spring temperatures slowed crop maturity, and record high temperatures in July severely burned grape clusters. Excellent weather during harvesting, laying, and drying prevented further loses.

Sultana production in Turkey is forecast at 140,000 tons, 4,000 tons less than the 1990/91 volume. Vacillating temperatures and persistent rains from May through July reduced both yields and berry size. Dry weather during August and early September allowed growers to harvest and dry the bulk of the crop without incident. However, the onset of cool, wet weather in mid-September panicked many growers into marketing their remaining supplies as table grapes, thus further reducing the dried pack.

Mexico's raisin pack is expected to total only 9,000 tons, 28 percent below the 1990/91 volume. The decline reflects the continuing rise in production costs, yield reductions caused by rain during the drying season, and diversion of raisin-type grapes to the more lucrative wine sector.

The 1991/92 sultana pack in Greece is forecast at 40,000 tons, up 8 percent from last year, but significantly below potential, due to the phyloxera problem and the higher prices being offered this season by fresh market wholesalers and wineries. However, current assessments indicate that, as the rootstock replacement program brings the phyloxera disease under control, Greek sultana production should recover to a more normal level of 70,000-80,000 tons.

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TABLE 19

WORLD PRODUCTION OF RAISINS/SULTANAS
(Metric Tons)

	1989/90	1990/91	1991/92 1/
NORTHERN HEMISPHERE			
Greece	83,580	37,000	40,000
Mexico	7,000	12,500	9,000
Turkey	138,000	144,000	140,000
United States	366,665	335,115	266,990
Total	595,245	528,615	455,990
SOUTHERN HEMISPHERE			
Argentina 2/	7,500	8,000	N/A
Australia 3/	54,834	79,839	N/A
Chile 2/	30,500	27,000	N/A
South Africa 3/	34,104	30,572	N/A
Total	126,938	145,411	N/A
WORLD TOTAL	725,999	674,026	N/A

1/ Preliminary.
2/ Estimate as of May 1991.
3/ Revised November 1991.

NOTE: Data for Afghanistan and Iran not available.

November 1991 Production Estimates and Crop Assessment Division, FAS, USDA

LATIN AMERICAN FORESTRY SITUATION

BRAZIL: The economic situation in Brazil is bleak. Rampant inflation, rising interest rates, soaring production costs, and recession in the construction and furniture industries continue to restrain growth in the forest products sector. Total fellings during 1991 are not expected to exceed the 1990 volume of 78.0 million cubic meters (CUM). Production of softwood logs and lumber, tropical hardwood logs and lumber, poles and pitprops, and railroad ties will reportedly remain stagnant at 1990 levels. Current assessments indicate that the panel products sector has not fared well amid the poor economic climate. Domestic and international pressures to preserve native stands in the Amazon, coupled with higher prices for resins and glues, have forced veneer and plywood plants utilizing tropical hardwoods to operate at only 50 percent of capacity for the past 2 years. Similarly, the retraction in the furniture industry has sharply reduced output of hardboard and particleboard. The outlook for 1991 envisions more idle production capacity and lower profits throughout the panel products sector.

CHILE: The Chilean forestry sector continues to expand. The 1991 annual cut is forecast at a record 18.2 million CUM, up 10 percent from last year. Fellings of softwood logs are expected to increase by 14 percent, to 8.2 million CUM, in response to strong demand from both the domestic construction industry and foreign markets. Production of softwood lumber is forecast at a record 3.1 million CUM, reflecting increased efficiency and expanding production capacity in Chilean sawmills. Output of temperate hardwood plywood and veneer has been trending upward over the past several years, but at a much slower rate than other solid wood products, due to slack domestic and export demand. Hardboard production has remained static at 52,000 CUM since 1989 because Chilean plants lack the additional capacity to increase production. No expansion in production capacity is expected in the near future. Production of particleboard slowed during 1990 as Chile's largest plant shut down to expand production capacity and retool with more efficient machinery. Production is expected to rebound to 185,000 tons in 1991, and rise an additional 15-20 percent in 1992. Growth potential of the medium density fiberboard sector remains strong. The opening of a new medium density fiberboard plant in late 1990 boosted 1991 production by 53 percent, to a record 95,000 CUM. Another plant scheduled to come on line in early 1992 will increase the sector's annual production capacity to 200,000 CUM.

MEXICO: Productivity within the Mexican forestry sector continues to decline. The outlook for 1991 projects reduced fellings of softwood and tropical hardwood logs and smaller output of all wood products. Only fellings of temperate hardwood logs are expected to increase during 1991--a reflection of higher demand for fuelwood.

VENEZUELA: Current assessments point to another difficult year for the Venezuelan forest products industry. The construction sector, Venezuela's largest consumer of wood products, remains paralyzed as interest rates hover around 40 percent. The furniture industry is in a slump as rampant inflation pushes non-essential items out of the reach of most consumers. However, the outlook for 1991 is not totally bleak. Fellings of softwood logs are projected to increase 4 percent, to 130,000 CUM, in order to meet rising demand from pulp plants. Expanding sawmill capacity and the opening of several new plywood facilities are expected to moderately increase production of both softwood lumber and plywood. Further growth in the production of softwood products is envisioned next year as concessionaires begin cutting new plantation stands of Caribbean pines, and on-going investments to vertically integrate and upgrade operations in sawmills and plywood plants improve the competitiveness of Venezuelan products.

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TABLE 20

LATIN AMERICA: FORESTRY PRODUCTION IN SELECTED COUNTRIES
(1,000 Cubic Meters)

BRAZIL:	1987	1988	1989	1990	1991 1/
HARVEST	79,700	81,700	81,000	78,000	78,000
Softwood Logs	16,000	16,200	16,500	15,500	15,500
Tropical Hardwood Logs	34,000	34,500	35,000	33,000	33,000
Poles/Piles/Posts/Pitprops	5,500	6,000	6,500	6,000	6,000
Softwood Lumber	1,900	2,100	3,200	2,900	2,900
Tropical Hardwood Lumber	8,200	8,300	9,000	8,500	8,500
Railroad Ties/Sleepers	110	120	130	120	120
Tropical Hardwood Veneer	230	250	255	213	205
Softwood Plywood	400	280	290	240	215
Tropical Hardwood Plywood	1,200	1,270	1,160	960	865
Hardboard	780	610	527	475	460
Particleboard	680	900	682	490	460

CHILE:	1987	1988	1989	1990	1991 1/
HARVEST	13,320	14,380	15,700	16,500	18,200
Softwood Logs	6,097	7,300	6,300	7,200	8,200
Softwood Lumber	2,310	2,380	2,320	2,870	3,100
Temperate Hardwood Plywood	29	33	37	40	42
Temperate Hardwood Veneer	5	5	6	8	8
Hardboard	45	46	52	52	52
Medium Density Fiberboard	0	2	17	62	95
Particleboard	172	175	190	178	185

MEXICO:	1987	1988	1989	1990	1991 1/
HARVEST	9,791	9,314	8,888	8,102	7,834
Softwood Logs	8,306	7,859	7,649	6,987	6,826
Temperate Hardwood Logs	387	459	430	361	366
Tropical Hardwood Logs	948	832	653	533	510
Poles/Piles/Posts/Pitprops	150	164	156	139	132
Softwood Lumber	2,550	2,505	2,600	2,498	2,420
Temperate Hardwood Lumber	77	80	83	80	76
Tropical Hardwood Lumber	92	110	86	84	75
Railroad Ties/Sleepers	349	225	134	82	80
Softwood Plywood	229	183	148	132	125
Hardwood Plywood	57	46	36	25	23
Hardboard	63	25	20	31	30
Medium Density Fiberboard	28	26	25	8	7
Particleboard	423	436	414	352	338

VENEZUELA:	1987	1988	1989	1990	1991 1/
HARVEST	580	976	639	555	500
Softwood Logs	330	260	194	125	130
Tropical Hardwood Logs	250	716	444	430	370
Softwood Lumber	125	156	122	75	78
Tropical Hardwood Lumber	75	325	213	206	195
Softwood Plywood	33	33	21	16	18
Tropical Hardwood Plywood	19	20	12	9	9

1/ Preliminary.

November 1991 Production Estimates and Crop Assessment Division, FAS, USDA

OCEANIA FORESTRY SITUATION

AUSTRALIA: Following last year's sharp decline in productivity, Australia's output of wood and wood products is expected to show moderate gains during 1991. The turnaround reflects a modest improvement in the economic climate generated by falling interest rates.

The 1991 timber cut is forecast at 17.1 million cubic meters (CUM), a 5 percent increase from 1990. A similar percentage increase is anticipated in softwood log fellings -- from approximately 5.8 million CUM in 1990 to nearly 6.1 CUM in 1991. Softwood logs account for approximately 36 percent of Australia's 1991 harvest, up from 24 percent in 1979. This increase reflects the expansion in softwood plantation areas that has occurred over the past several decades. The level of activity in the construction industry is the leading determinant of softwood lumber production. The decline in interest rates -- from 15.5 percent in early 1990 to the current rate of 12.5 percent -- reportedly has spurred some activity in the housing sector, but less than would normally be expected, due to a general lack of confidence in the economy and a high unemployment rate. Consequently, production of softwood lumber is forecast at 1.4 million, only 2 percent greater than a year ago.

Production prospects are mixed in the panel products sector. Plywood production is expected to plummet 15 percent to 86,000 CUM, potentially the lowest level since 1983. Historically, the bulk of Australia's plywood production consisted of quality hardwoods for decorative applications. However, declining access to mature hardwood stands forced the closure of many plywood plants that specialized in the production of decorative plywood. Today, only about 30 percent of Australia's plywood is manufactured from hardwoods. The remainder is made from plantation softwoods. The substitution of softwoods for hardwoods necessitated a diversification of the end-uses of plywood -- from decorative applications to structural and construction uses. Since most structural plywood is consumed by the non-residential construction market, the continuing slump in this market accounts for the sharp decline in plywood production forecast for 1991.

Australia's production of all board products is expected to increase in 1991. The largest percentage gain -- 12 percent over last year -- is projected for medium density fiberboard whose strong growth potential lies in its versatility as both a building and furniture grade product.

NEW ZEALAND: Current assessments indicate that New Zealand's 1991 timber harvest will reach a record 13.5 million CUM, up 3 percent from a year ago. The increase reflects strong international demand for softwood logs and medium density fiberboard. The long-term outlook is for further increases in fellings, but at a much slower rate. For the past several years, afforestation and reforestation efforts have lagged significantly behind the rate of removals. In 1990, only about 12,000 hectares were replanted compared to 48,000 hectares in 1986. The main reason for the decline in plantings was the government's decision to discontinue tax deductions for planting costs. The government has recently reversed this decision as an impetus to spur new plantings.

Strong foreign demand for softwood logs is expected to boost 1991 production to a record 8.1 million CUM, a 10 percent increase over the 1990 level. Softwood lumber should keep trending upward in response to expanding exports, but production prospects will be tempered by static domestic demand and rising log prices.

Medium density fiberboard is the growth industry in the panel products sector. Production has increased steadily since 1982, and expectations are that output in 1991 will reach a record 480,000 CUM. Production levels for plywood, veneer, and particleboard are determined primarily by the state of the domestic market. The general slowdown in the economy, coupled with recession in the construction industry, is expected to moderately reduce 1991 output of these products.

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TABLE 21

OCEANIA FORESTRY PRODUCTION
(1,000 Cubic Meters)

AUSTRALIA:	1987	1988	1989	1990	1991 1/
HARVEST	17,460	17,628	16,500	16,250	17,120
Softwood Logs	6,090	6,153	6,100	5,769	6,078
Poles/Piles/Posts/Pitprops	400	271	250	250	250
Softwood Lumber	1,307	1,644	1,536	1,425	1,454
Railroad Ties/Sleepers	150	140	123	125	126
Plywood	111	130	125	101	86
Hardboard	117	130	112	99	101
Medium Density Fiberboard	100	122	191	203	227
Insulation Board	12	11	11	13	14
Particleboard	715	779	743	614	620

NEW ZEALAND:	1987	1988	1989	1990	1991 1/
HARVEST	9,046	10,200	11,644	13,105	13,500
Softwood Logs	4,957	5,676	6,080	7,365	8,109
Poles/Piles/Posts/Pitprops	171	165	190	205	216
Softwood Lumber	1,837	1,842	2,096	2,156	2,260
Softwood Plywood	60	61	67	67	65
Softwood Veneer	83	77	86	82	79
Medium Density Fiberboard	294	392	431	462	480
Particleboard	183	175	169	161	155

1/ Preliminary.

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DAIRY PRODUCTION IN SELECTED COUNTRIES

Cow milk production for selected countries for 1991 is forecast at 427 million tons, down 4 percent, reversing a pattern of steady growth. Another small decline is forecast for 1992. Declines in both years largely reflect the unfavorable conditions faced by milk producers in the Soviet Union. Besides the Soviet Union, 1991 output is also expected to be down in Brazil, in the EC, particularly Germany, and in the eastern European countries. Mexico and China are expected to show significant increases in milk production.

Since milk production in these selected countries is down, production of most of the major dairy products is forecast to decline. Output of butter in 1991 is forecast at 6.52 million tons, 4 percent below 1990. A further decline is forecast for 1992. Output of cheese, forecast at 10.9 million tons in 1991, is essentially unchanged from 1990. Growth of 1 percent is forecast for 1992. Nonfat dry milk (NDM) output is forecast to total 3.31 million tons in 1991, down 7 percent from 1990. Most of the decline is expected in the EC. In 1992 NDM production is forecast to decline at about the same rate as in 1991. Casein output is forecast at 204,000 tons in 1991, down 8 percent, and at 208,000 tons for 1992.

Milk production for the United States in 1991 is forecast at 67.4 million tons, slightly above 1990 production of 67.3 million tons. The number of milk cows is down 1 percent with a similar rate of decline forecast for 1992. U.S. milk output in 1992 is forecast to show a small increase. In Canada, another cut in the quota for processing milk deliveries is the main cause of the forecast decline in cow numbers and milk production. Continuing decreases in demand for butterfat, reflected both by declining butter production and increased consumption of lowfat milk, is the reason for the cut in the manufacturing quota. Mexico's 1991 milk output is now forecast at 10.2 million tons, 9 percent above 1990. Abundant rainfall in the northern and central regions of the country and increased production in the tropical south boosted 1991 output. Favorable demand prospects due to recovery of the domestic economy are forecast to provide sufficient incentive to increase output again in 1992. Continued imports of dairy cattle, mostly from the United States, have facilitated a further increase in the milk cow herd.

Cow milk production in Brazil is forecast to contract 5 percent in 1991 as the impact of a prolonged dry season has been compounded by low prices. Output should increase in 1992 if, as many producers expect, milk prices are decontrolled and if more normal patterns of weather prevail. Argentina's 1991 milk output, forecast at 6.2 million tons, is down 3 percent reflecting very tight margins that are forcing both producers and processors out of business. Some price recovery is forecast for 1992 as milk is currently in short supply. Favorable milk prices in Chile are forecast to stimulate production increases in 1991 and 1992; however, improved beef prices likely will induce some farmers to consider expanding beef production rather than dairy during 1992. Venezuela's 1991 milk production is forecast to decline again as producers continue adjusting to sharply higher feed costs arising from the removal of foreign exchange subsidies. Though details have not been announced as of yet, a new dairy policy for 1992 and beyond is expected to bring some price relief.

Forecasts of milk production in 1991 and 1992 in the EC are down from recent years, largely due to smaller quotas and the German situation. Output in Germany is forecast at 29.8 million tons in 1991, 4 percent below the 1990 level as the eastern region adapts to market conditions and EC quotas. Dairy cow numbers in the eastern states were down over 30 percent, pulling the 1991 average for all Germany down 12 percent. French milk production in 1991 is forecast at 26.3 million tons, less than 1 percent below last year's level despite a 2 percent cut in the EC quota. Milk output in Italy is forecast at 11.2 million tons, nearly 3 percent below the revised 1990 level. The Government of Italy is now subtracting super levy payments (for over-quota production) directly from the payments to farmers rather than allowing farmers to defer payment as was done in the past. To help the industry stay within the national quota, the Government of Italy has implemented a program to take an extra 100,000 cows out of production. Milk output in the United Kingdom and the Netherlands during 1991 are each forecast down about 2 percent in response to the 2 percent cut in the EC quota. Quotas for individual producers in these two countries were cut more than 2 percent because of adjustments for higher fat content of the milk and because of within country reallocations. Milk output in Spain and Portugal, where the quota system became fully effective in 1991, is forecast to decline in Spain while growth will slow in Portugal.

Milk production in Eastern Europe is expected to decline 6 percent in 1991. Weak domestic demand for milk and milk products is the major problem. Barring a major turn-around in the region's economy, a 3 percent decline is forecast for 1992 as the lack of profitability drives small producers out of business. In the Soviet Union, milk output for 1991 is forecast at 98 million tons, nearly 10 percent below 1990. Another decline is forecast for 1992. Short supplies of forage and grain for feed and problems in the general economy are taking a severe toll on the dairy sector.

Milk production in Japan in 1991 is largely unchanged from the 1990 level. Production costs have been declining but the support price for manufacturing milk has also declined. A 1 percent increase in production is forecast for 1992 as current shortages have increased prospects for more favorable prices. Following a favorable 1990 season, India's 1991 output is forecast to remain at the 1990 level. The delayed monsoon in northern and western states appears to have reduced forage availability and thereby milk yields. Higher prices resulting from the forage shortages could bring a production increase in 1992. Favorable feed prices and government encouragement for the industry are expected to boost China's 1991 milk production by 8 percent, to 4.5 million tons. A similar rate of growth is forecast for 1992.

Australia's 1991 milk production totaled 6.6 million tons, up 2 percent from 1990. Victoria, the major dairy province, and Tasmania experienced unusually favorable summer and fall pasture conditions. A decline of about 2 percent is forecast for 1992 as dairy sector profitability has fallen and dry conditions are affecting some dairy areas. New Zealand's 1991 (June 1990-May 1991) production was up 3 percent. The first 6 months of the year were characterized by extremely favorable pasture growing conditions. Output for 1992 is forecast at 8.1 million tons, up 2 percent as farmers, responding to a more optimistic outlook, have increased their dairy herds. The initial payment for the 1991/92 year was NZ$3.70 per kilogram of milk fat, the same as last year's final payout. Many analysts think this year's final Dairy Board payout will be above NZ$4.00. In addition, many processors pay a bonus on top of the Dairy Board payout.

Butter production in selected countries is forecast to total 6.5 million tons in 1991, 4 percent below the 1990 level. Production in 1992 is forecast to decline another 3 percent. Butter production in 1991 in the United States is forecast at 625,000 tons, up 6 percent with much of the increase due to the government support program. A 10 percent decline is forecast for 1992 as surplus milk supplies decline and output of cheese rebounds. After 3 years of relatively stable production, EC output of butter in 1991 is forecast to fall nearly 10 percent. Most of the decline is occurring in Germany where many consumers in the eastern region are switching to margarine as it becomes more available. Reduced milk manufacturing supplies resulted in cuts in butter production in the traditional exporting countries of Denmark, France, and the Netherlands. In Eastern Europe, 1991 butter production is forecast down nearly 10 percent reflecting smaller milk supplies and weaker domestic demand. With reduced milk supplies and distribution problems with the milk that is available, butter production in the USSR is forecast to show an 8 percent decline in 1991. A further decline is likely in 1992. New Zealand's output of butter was 269,000 tons in 1991, down 3 percent from 1990. Improved export prospects for whole milk powder was the major factor behind the decline.

Cheese production in selected countries for 1991 is forecast at 10.9 million tons, essentially unchanged from 1990. Growth of about 1 percent is forecast for 1992. U.S. cheese production in 1991 is forecast down about 2 percent. Demand for cheese weakened in response to economic conditions. Renewed production growth is forecast for 1992. Cheese output in the EC, after stagnating in 1990, is forecast to grow 2 percent in 1991 and stay near that level in 1992. Output in France and the Netherlands is expected to reach new records in 1991 based on continued growth in domestic and export utilization. German production is rebounding after last year's sharp decline following reunification. Current production surpluses in the UK and Italy may cause production declines in 1992. Cheese output in New Zealand was up in 1991 as some manufacturing milk was diverted from butter manufacture to cheese production. Further growth in cheese output is expected in 1992.

Output of nonfat dry milk (NDM) in selected countries in 1991 is forecast down about 7 percent, despite a 6 percent increase in U.S. output. EC production is forecast to decline about 9 percent due mainly to declines in France, the UK, and Ireland. Output in these three countries was unexpectedly higher last year. Production of NDM in New Zealand is estimated down nearly a one-fifth in 1991 as export markets for whole dried milk have been relatively more favorable. Another decline in NDM output is forecast for 1992.

Casein production in selected countries is forecast at 204,000 tons in 1991, down 8 percent from 1990. A 2 percent increase is forecast for 1992. EC production is forecast to decline about 7 percent in 1991 as producers continue to react to the reduced production subsidy and to poor export prospects. Casein output in New Zealand stabilized in 1991 and may increase a little in 1992 in line with the increase in milk production.

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TABLE 22

MILK COW NUMBERS IN SELECTED COUNTRIES
(1,000 head)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 2/
Canada	1,481	1,467	1,449	1,429	1,410	1,390
Mexico	6,300	6,200	6,300	6,410	6,440	6,470
United States	10,327	10,262	10,126	10,127	10,015	9,893
NORTH AMERICA	18,108	17,929	17,875	17,966	17,865	17,753
Argentina	2,400	2,360	2,150	2,000	1,950	1,950
Brazil	14,700	14,700	14,650	15,100	15,500	15,200
Chile	600	630	640	645	640	635
Peru	700	703	685	620	625	630
Venezuela	1,298	1,300	1,210	1,170	1,150	1,110
SOUTH AMERICA	19,698	19,693	19,335	19,535	19,865	19,525
Bel-Lux	984	954	930	926	893	865
Denmark	811	774	764	770	769	765
France	6,359	5,841	5,574	5,489	5,400	5,350
Germany	7,322	7,071	6,960	6,680	5,900	5,700
Greece	233	232	226	242	245	235
Ireland	1,490	1,444	1,387	1,400	1,380	1,370
Italy	3,021	3,020	2,973	2,925	2,924	2,750
Netherlands	2,043	1,946	1,888	1,855	1,840	1,830
Portugal	388	402	414	398	403	405
Spain	1,890	1,882	1,880	1,834	1,586	1,500
United Kingdom	3,311	3,166	3,142	3,220	3,207	3,159
EC-12	27,852	26,732	26,138	25,739	24,547	23,929
Austria	976	891	887	883	880	876
Finland	580	535	509	492	443	430
Norway	357	346	343	340	340	340
Sweden	576	565	560	555	508	478
Switzerland	790	786	795	785	784	784
OTHER WEST EUROPE	3,279	3,123	3,094	3,055	2,955	2,908
Czechoslovakia	1,791	1,788	1,812	1,761	1,650	1,600
Hungary	585	578	580	570	545	505
Poland	4,937	4,806	4,994	4,900	4,707	4,500
Romania	2,111	2,075	2,030	1,990	1,600	1,500
Yugoslavia	2,610	2,585	2,516	2,480	2,425	2,470
EAST EUROPE	12,034	11,832	11,932	11,701	10,927	10,575
USSR	42,400	42,000	41,809	41,734	41,000	40,500
SOUTH AFRICA	1,985	1,814	1,870	1,763	1,775	1,780
India	28,500	28,500	29,000	32,100	31,000	32,500
China	1,846	2,164	2,222	2,691	2,800	2,900
Japan	1,052	1,046	1,066	1,081	1,081	1,085
ASIA	31,398	31,710	32,288	35,872	34,881	36,485
Australia 3/	1,707	1,697	1,663	1,631	1,595	1,555
New Zealand 4/	2,252	2,280	2,236	2,269	2,300	2,300
OCEANIA	3,959	3,977	3,899	3,900	3,895	3,855
WORLD	160,713	158,810	158,240	161,265	157,710	157,310

1/ Preliminary. 2/ Forecast. 3/ Year beginning July 1.
4/ Year beginning June 1.

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TABLE 23

COW MILK PRODUCTION IN SELECTED COUNTRIES
(1,000 metric tons)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 2/
Canada	7,986	8,229	7,980	7,975	7,950	7,900
Mexico	8,971	8,830	8,970	9,330	10,200	10,700
United States	64,732	65,840	65,424	67,259	67,420	67,560
NORTH AMERICA	81,689	82,899	82,374	84,564	85,570	86,160
Argentina	6,582	6,168	6,725	6,400	6,200	6,300
Brazil	13,300	13,200	13,400	14,500	13,800	14,800
Chile	1,133	1,154	1,270	1,420	1,490	1,560
Peru	655	668	652	565	600	630
Venezuela	1,641	1,796	1,688	1,662	1,591	1,540
SOUTH AMERICA	23,311	22,986	23,735	24,547	23,681	24,830
Bel-Lux	4,074	3,915	3,917	3,901	3,816	3,700
Denmark	4,860	4,739	4,747	4,742	4,640	4,640
France	27,146	26,000	26,150	26,400	26,300	26,250
Germany	32,400	32,000	32,400	31,200	29,800	29,400
Greece	628	652	675	735	738	715
Ireland	5,751	5,573	5,575	5,623	5,568	5,512
Italy	10,300	10,671	10,828	11,491	11,200	11,000
Netherlands	11,672	11,406	11,321	11,285	11,130	11,250
Portugal	1,253	1,346	1,420	1,519	1,550	1,580
Spain	5,941	5,950	6,000	6,200	6,100	5,950
United Kingdom	15,360	14,880	14,647	14,961	14,635	14,490
EC-12	119,385	117,132	117,680	118,057	115,477	114,487
Austria	3,687	3,320	3,318	3,315	3,300	3,300
Finland	2,938	2,721	2,729	2,752	2,442	2,363
Norway	1,961	1,908	1,903	1,900	1,900	1,900
Sweden	3,477	3,445	3,420	3,520	3,242	3,110
Switzerland	3,768	3,768	3,889	3,843	3,850	3,845
OTHER WEST EUROPE	15,831	15,162	15,259	15,330	14,734	14,518
Czechoslovakia	6,921	6,963	7,031	6,861	6,400	6,200
Hungary	2,770	2,788	2,840	2,743	2,625	2,475
Poland	15,467	15,450	16,371	15,801	15,000	14,300
Romania	4,275	4,300	4,150	4,775	4,100	4,050
Yugoslavia	4,736	4,629	4,599	4,500	4,450	4,500
EAST EUROPE	34,169	34,130	34,991	34,680	32,575	31,525
USSR	103,400	106,800	108,529	108,700	98,000	95,000
SOUTH AFRICA	2,410	2,450	2,557	2,503	2,509	2,515
India	21,200	22,000	24,000	27,500	27,000	28,500
China	3,301	3,660	3,813	4,157	4,500	4,800
Japan	7,335	7,607	8,059	8,190	8,180	8,250
ASIA	31,836	33,267	35,872	39,847	39,680	41,550
Australia 3/	6,367	6,297	6,465	6,435	6,578	6,474
New Zealand 4/	7,245	7,936	7,406	7,746	7,973	8,119
OCEANIA	13,612	14,233	13,871	14,181	14,551	14,593
GRAND TOTAL	425,643	429,059	434,868	442,409	426,777	425,178

1/ Preliminary. 2/ Forecast. 3/ Year beginning July 1.
4/ Year beginning June 1.

November 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 24

BUTTER PRODUCTION IN SELECTED COUNTRIES
(1,000 metric tons)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 2/
Canada	95	105	99	97	100	100
Mexico	26	32	33	34	34	35
United States	501	547	588	591	625	560
NORTH AMERICA	622	684	720	722	759	695
Argentina	34	35	45	40	38	40
Brazil	65	65	65	75	70	75
Venezuela	5	4	2	3	3	3
SOUTH AMERICA	104	104	112	118	111	118
Bel-Lux	94	81	89	87	85	85
Denmark	96	94	92	93	72	70
France	569	521	518	527	500	500
Germany	786	700	711	640	533	530
Greece	5	5	6	6	7	7
Ireland	150	139	156	149	146	138
Italy	70	71	74	80	80	75
Netherlands	234	214	213	209	198	175
Portugal	8	10	12	15	17	19
Spain	29	27	30	46	43	35
United Kingdom	174	140	130	130	120	125
EC-12	2,215	2,002	2,031	1,982	1,801	1,759
Austria	41	42	41	40	42	42
Finland	68	61	63	63	54	52
Norway	25	23	26	29	26	26
Sweden	64	61	70	78	65	60
Switzerland	34	35	39	38	37	37
OTHER WEST EUROPE	232	222	239	248	224	217
Czechoslovakia	149	148	156	159	150	145
Hungary	33	35	38	38	29	26
Poland	290	293	325	315	285	300
Romania	42	40	46	42	43	40
Yugoslavia	8	8	12	11	8	9
EAST EUROPE	522	524	577	565	515	520
USSR	1,742	1,724	1,726	1,730	1,600	1,550
SOUTH AFRICA	11	15	16	21	18	18
India	750	850	880	970	1,040	1,020
Japan	69	68	78	76	70	76
ASIA	819	918	958	1,046	1,110	1,096
Australia 3/	104	98	96	111	114	111
New Zealand 4/	248	276	246	276	269	267
OCEANIA	352	374	342	387	383	378
GRAND TOTAL	6,619	6,567	6,721	6,819	6,521	6,351

1/ Preliminary. 2/ Forecast. 3/ Year beginning July 1.
4/ Year beginning June 1.

November 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 25

CHEESE PRODUCTION IN SELECTED COUNTRIES
(1,000 metric tons)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 2/
Canada	246	252	247	250	255	250
Mexico	298	370	373	384	395	400
United States	2,424	2,527	2,546	2,749	2,695	2,885
NORTH AMERICA	2,968	3,149	3,166	3,383	3,345	3,535
Argentina	277	265	260	270	280	280
Brazil	195	200	220	200	220	220
Venezuela	82	96	94	96	92	90
SOUTH AMERICA	554	561	574	566	592	590
Bel-Lux	35	37	38	42	41	41
Denmark	271	258	275	293	283	288
France	1,342	1,378	1,485	1,490	1,510	1,520
Germany	817	849	885	749	830	840
Greece	197	203	210	200	210	205
Ireland	65	75	74	76	69	70
Italy	704	737	760	811	810	780
Netherlands	552	559	568	593	613	600
Portugal	47	44	55	49	49	48
Spain	113	120	123	133	140	150
United Kingdom	263	299	280	316	295	278
EC-12	4,406	4,559	4,753	4,752	4,850	4,820
Austria	78	84	88	87	85	84
Finland	78	75	78	81	73	72
Norway	75	74	76	76	76	76
Sweden	107	115	109	108	107	109
Switzerland	128	134	137	138	139	140
OTHER WEST EUROPE	466	482	488	490	480	481
Czechoslovakia	142	146	152	150	140	135
Hungary	52	54	54	64	58	58
Poland	123	133	130	126	125	125
Romania	86	84	82	87	95	90
Yugoslavia	48	54	56	52	45	48
EAST EUROPE	451	471	474	479	463	456
USSR	861	894	900	881	800	770
SOUTH AFRICA	44	43	48	48	46	47
JAPAN	25	26	27	28	29	30
Australia 3/	177	176	190	175	176	180
New Zealand 4/	113	128	128	122	125	129
OCEANIA	290	304	318	297	301	309
GRAND TOTAL	10,065	10,489	10,748	10,924	10,906	11,038

1/ Preliminary. 2/ Forecast 3/ Year beginning July 1.
4/ Year beginning June 1.

November 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 26

NONFAT DRY MILK PRODUCTION IN SELECTED COUNTRIES
(1,000 metric tons)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 2/
Canada	110	110	93	95	93	91
Mexico	4	5	6	9	9	9
United States	480	444	397	398	420	350
NORTH AMERICA	594	559	496	502	522	450
Argentina	13	22	45	34	26	26
Brazil	30	40	50	60	55	60
Chile	4	4	4	5	5	5
Venezuela	12	4	2	2	2	3
SOUTH AMERICA	59	70	101	101	88	94
Bel-Lux	99	83	98	94	95	96
Denmark	18	7	13	41	17	15
France	603	490	492	580	500	500
Germany	526	446	500	509	520	450
Ireland	129	100	140	195	182	160
Italy	0	1	0	0	0	0
Netherlands	98	87	83	70	53	50
Portugal	8	9	10	15	17	19
Spain	39	29	31	46	43	30
United Kingdom	193	136	133	166	142	131
EC-12	1,713	1,388	1,500	1,716	1,569	1,451
Austria	28	23	21	24	26	25
Finland	39	28	26	22	15	15
Sweden	46	36	48	51	29	20
Switzerland	23	36	33	32	31	31
OTHER WEST EUROPE	136	123	128	129	101	91
Poland	156	159	174	175	160	150
Yugoslavia	6	10	11	10	8	9
EAST EUROPE	162	169	185	185	168	159
USSR	310	350	300	300	280	260
SOUTH AFRICA	12	19	20	26	21	20
India	54	80	90	72	65	75
Japan	153	159	178	179	170	176
ASIA	207	239	268	251	235	251
Australia 3/	128	120	127	144	155	151
New Zealand 4/	173	198	181	208	171	165
OCEANA	301	318	308	352	326	316
GRAND TOTAL	3,494	3,235	3,306	3,562	3,310	3,092

1/ Preliminary. 2/ Forecast. 3/ Year beginning July 1.
4/ Year beginning June 1.

November 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 27

CASEIN PRODUCTION IN SELECTED COUNTRIES
(1,000 metric tons)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 2/
Denmark	17	21	19	13	16	16
France	52	61	47	26	25	25
Germany	25	25	22	16	18	18
Ireland	39	44	32	28	27	28
Netherlands	20	20	20	30	20	18
United Kingdom	1	0	1	2	1	1
EC-12	154	171	141	115	107	106
POLAND	22	24	33	38	30	33
Australia	8	9	7	5	3	3
New Zealand	62	66	56	64	64	66
OCEANIA	70	75	63	69	67	69
GRAND TOTAL	246	270	237	222	204	208

1/ Preliminary. 2/ Forecast. 3/ Year beginning July 1.
4/ Year beginning June 1.

November 1991 Production Estimates and Crop Assessment Division, FAS, USDA

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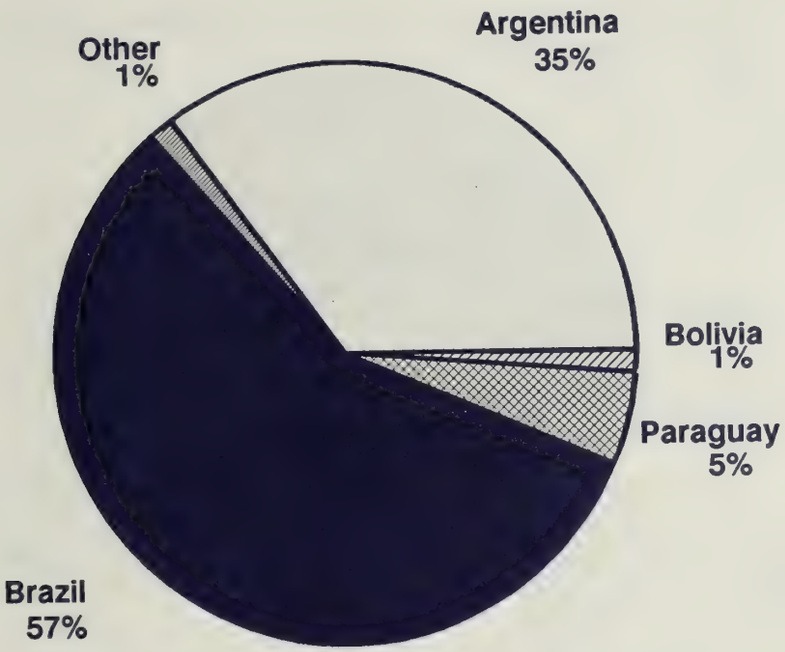
WAP 12-91
December 1991

World Agricultural Production

South American 1992 Soybean Production



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Production Articles This Month...

South American Soybeans
Tobacco Prospects for 1992
Mongolian Agricultural Situation
Soviet Sunflower
World Citrus
World Tobacco
World Coffee
Plus: Special Index of This Year's Feature Articles

Approved by the World Agricultural Outlook Board - USDA

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-261), December 11, 1991.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 720-0888 or by FAX (202) 720-8880.

****
* The next issue of World Agricultural Production will be released at 3 p.m. *
* eastern time on January 14, 1992. *
****

CONVERSION TABLE

Metric Tons to Bushels		Metric Tons to 480-lb. Bales	
		Cotton	= MT*4.592917
Wheat & Soybeans	= MT*36.7437		
Corn, Sorghum, Rye	= MT*39.36825		
Barley	= MT*45.929625		
Oats	= MT*68.894438	Metric Tons to Hundredweight	
		Rice	=MT*22.04622
1 hectare	= 2.471044 acres		
1 kilogram	= 2.204622 pounds		

NOTE: BEGINNING WITH THE MAY EDITION, THIS CIRCULAR SERIES COMBINES DATA FOR THE TERRITORIES FORMERLY KNOWN AS EAST GERMANY (GDR) AND WEST GERMANY (FRG) UNDER THE HEADING GERMANY. LIKEWISE, DATA FOR THE TERRITORY FORMERLY CALLED EAST GERMANY (GDR) ARE INCLUDED IN AGGREGATES FOR THE EUROPEAN COMMUNITY (EC-12) AND EXCLUDED FROM AGGREGATES FOR EASTERN EUROPE. BECAUSE OF THIS, DATA FOR "GERMANY", EASTERN EUROPE, AND THE EUROPEAN COMMUNITY (EC-12) ARE NOT COMPARABLE WITH DATA PUBLISHED IN PRIOR EDITIONS OF THIS CIRCULAR SERIES AND MAY NOT BE COMPARABLE WITH SUCH ESTIMATES FOUND IN OTHER PUBLICATIONS OF THE U.S. DEPARTMENT OF AGRICULTURE.

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PRODUCTION HIGHLIGHTS FOR 1991/92

December 1991

WHEAT: World production for 1991/92 is estimated at 545.4 million tons, down 2.0 million, or less than 1 percent from last month and down 8 percent from last year. Total foreign production is estimated at 491.5 million tons, down 2.0 million or less than 1 percent from last month and down 5 percent from last year. Country highlights are as follows:

- **United States** Production is estimated at 53.9 million tons, unchanged from last month and down 28 percent from last year.

- **Eastern Europe** Production is estimated at 39.2 million tons, down 1.5 million or 4 percent from last month's estimate and down 5 percent from last year's harvest. The decrease is due to reduced production in Romania, which more than offset increased Polish production. Excessive rainfall, lack of machinery and parts, and a critical shortage of inputs, particularly protection chemicals, contributed to the decline in Romanian production.

- **Argentina** Production is estimated at 8.5 million tons, down 0.5 million or 6 percent from last month and down 19 percent from last year. Decreases in planted area account for the lower production.

- **Chile** Production is estimated at 1.5 million tons, down 0.2 million or 9 percent from last month and down 3 percent from last year. Higher planted area in 1991/92 will not offset the decline in yields.

- **Canada** Production is estimated at a record 32.8 million tons, down 0.2 million, or 1 percent from last month, but up marginally from last year. Statistics Canada indicated a decrease in area resulted in lower output despite slightly higher yields.

- **South Africa** Production is estimated at 2.3 million tons, up 0.2 million, or 8 percent from last month and up 34 percent from last year. The hot, dry weather since mid-November assisted with the ripening and harvest of the crop in the Orange Free State.

COARSE GRAINS: World production for 1991/92 is estimated at 803.8 million tons, up 2.2 million, a marginal increase from last month, but down 4 percent from last year. Total foreign production is estimated at 585.0 million tons, up 2.2 million, or less than 1 percent from last month, but down 3 percent from last year. Country highlights are as follows:

- **United States** — Production is estimated at 218.7 million tons, unchanged from last month and down 5 percent from last year.

- **China** — Production is estimated at 110.6 million tons, up 4.0 million or 4 percent from last month, but down 3 percent from last year. The corn production estimate was increased to 95.0 million tons, up 4 million from last month and close to last year's record crop. Expanded use of hybrids and excellent harvest weather in the major corn growing provinces led to higher than expected yields.

- **EC-12** — Production is estimated at 88.3 million tons, up 0.2 million, or less than 1 percent from last month and up 5 percent from last year. An increase in yields of barley in France and sorghum, rye, oats, and mixed grains in Spain accounted for the rise.

- **Canada** — Production is estimated at 22.7 million tons, down 0.8 million or 3 percent from last month and down 11 percent from last year. Based on Statistics Canada, production estimates for barley, oats, and rye were lowered, while estimates for corn rose to a record level.

- **Australia** — Production is estimated at 6.4 million tons, down 0.6 million or 8 percent from last month and down 5 percent from last year. The reduction is due to drought in northeast barley and oats growing areas. Strong barley production prospects are still forecast for the primary growing regions of South Australia, Victoria, and Western Australia.

- **Mexico** — Production is estimated at 17.5 million tons, down 0.5 million or 3 percent from last month and down 4 percent from last year. The reduction is due to a decrease in sorghum harvested area and consequently production, especially in the Bajio region.

- **Eastern Europe** — Production is estimated at 61.3 million tons, down 0.3 million or less than 1 percent from last month, but up 17 percent from last year's drought-reduced harvest. The decrease is due primarily to reduced production of Romanian barley and Polish oats, which more than offset increased Polish corn and Yugoslav barley production.

RICE (MILLED-BASIS): World production for 1991/92 is estimated at 344.9 million tons, down 0.7 million or less than 1 percent from last month and down 2 percent from last year's record crop. Total foreign production in 1991/92 is estimated at 339.9 million tons, down 0.7 million or slightly below last month's estimate and down 7.3 million or 2 percent from 1990/91. Country highlights are as follows:

- **United States** — Production is estimated at 5.0 million tons, unchanged from last month and down marginally from last year.

- **Japan** — Production is estimated at 8.8 million tons, down 0.6 million or 7 percent from last month and down 8 percent from last year. The estimate was reduced due to extremely poor weather during the harvest season and slightly lower area. Since September, Japan has been hit by heavy rainfall, below-normal temperatures, and two typhoons that seriously damaged many crops, including rice.

OILSEEDS: Total world oilseeds production during 1991/92 is forecast at a record 222.5 million tons, up marginally from last month and up 2 percent from 1990/91. Foreign production during 1991/92 is forecast to be a record 158.8 million tons, up 0.1 million or less than 1 percent from last month and up 1 percent from last year. Total oilseed production in the United States is forecast at 63.7 million tons, down 0.1 million or less than 1 percent from last month, but up 5 percent from last year.

* **Soybeans:** World production for 1991/92 is forecast at 105.1 million tons, down 0.2 million or less than 1 percent from last month, but up 2 percent from last year. Total foreign soybean output is forecast at 51.7 million tons, down 0.2 million or less than 1 percent from last month, but up 2 percent from 1990/91. Country highlights are as follows:

  - **United States** — Production is estimated at 53.4 million tons, unchanged from last month, but up 2 percent from last year. The National Agricultural Statistics Service, USDA, estimates harvested area at 23.7 million hectares, up 4 percent from 1990/91.

  - **China** — Production is estimated at 10.1 million tons, up 0.1 million or 1 percent from last month, but down 8 percent from last year. Official Chinese sources report that production losses from flooding this summer were not as large as earlier estimated.

  - **India** — Production is estimated at 2.3 million tons, down 0.4 million or 15 percent from last month and down 6 percent from last year's record harvest. Area and yield expectations were lowered this month, but 1991/92 area is estimated up 5 percent over last year, continuing the expansion of this non-traditional oilseed in central India.

- o **Canada** — Production is estimated at a record 1.4 million tons, up 0.2 million or 14 percent from last month and up 9 percent from last year. Statistics Canada indicated a higher than anticipated yield and a record harvested area.

* **Cottonseed:** World production for 1991/92 is forecast at 34.6 million tons, down 0.3 million or 1 percent from last month, but up 3 percent from last year. Total foreign production is forecast at 28.3 million tons, down 0.3 million or 1 percent from last month, but up less than 1 percent from last year. Country highlights are as follows:

  - o **United States** — Production is estimated at 6.3 million tons, down 80,000 or 1 percent from last month, but up 16 percent from 1990/91. Official estimates by the National Agricultural Statistics Service this month decreased expected harvested area marginally to 5.4 million hectares, up nearly 14 percent from last year.

  - o **India** — Production is estimated at 4.1 million tons, down 0.2 million or 5 percent from last month, but up 5 percent from last year's disappointing crop. Harvested area is estimated down slightly from last year, but cotton yields are expected to rise owing to more favorable weather conditions in 1991/92.

  - o **Australia** — Production is estimated at 0.6 million tons, down 0.1 million or 14 percent from last month and down 14 percent from last year. Cotton area and yield are forecast to decline owing to continued drought conditions in the primary growing zone of eastern Australia.

* **Peanuts:** World production for 1991/92 is forecast at 23.3 million tons, down 0.2 million or 1 percent from last month, but up 2 percent from 1990/91. Total foreign production is forecast at 21.1 million tons, down 0.2 million or 1 percent from last month and down 1 percent from last year. Country highlights are as follows:

  - o **United States** — Production is estimated at a record 2.2 million tons, unchanged from last month, but up 37 percent from 1990/91. The National Agricultural Statistics Service expects average yield to recover from last year's level and pegs harvested area at 795,000 hectares, up nearly 9 percent from 1990/91.

  - o **India** — Production is estimated at 8.0 million tons, down 0.2 million or 2 percent from last month and down 1 percent from last year's drought affected crop. Peanut area is forecast slightly above last year's level, while yields declined owing to severe drought in Gujarat.

* **Sunflowerseed:** World production for 1991/92 is forecast at 21.6 million tons, up 0.2 million or 1 percent from last month, but down 4 percent from 1990/91. Total foreign production is forecast at 20.1 million tons, up 0.2 million or 1 percent from last month, but down 7 percent from last year. Country highlights are as follows:

  - **United States** — Production is estimated at 1.5 million tons, unchanged from last month, but up 45 percent from last year. NASS estimates harvested area at 1.0 million hectares, up 37 percent from 1990/91.

  - **EC-12** — Production is estimated at 4.1 million tons, up 70,000 or 2 percent from last month, but down 4 percent from last year. Higher than anticipated area and yields in Italy increased output.

  - **China** — Production is estimated at 1.3 million tons, up 0.1 million or 9 percent from last month, but down 7 percent from last year. Very favorable weather in the major sunflowerseed producing provinces led to above average yields.

* **Rapeseed:** World production for 1991/92 is forecast at a record 27.8 million tons, up 0.6 million or 2 percent from last month and up 10 percent from last year. Total foreign production is forecast at 27.7 million tons, up 0.6 million or 2 percent from last month and up 9 percent from last year. Country highlights are as follows:

  - **United States** — Production is estimated at 105,000 tons, unchanged from last month, but nearly double that of last year. Area and production data for 1987/88 through the initial 1991/92 forecast are estimates from the Inter-agency Oilseeds Committee and the World Agricultural Outlook Board. The National Agricultural Statistics Service, USDA, is expected to announce its U.S. rapeseed area estimates in January 1992.

  - **EC-12** — Production is estimated at 7.4 million tons, up 0.1 million or 1 percent from last month and up 20 percent from last year. An increase in Germany's yield more than offset a decrease in Denmark's harvested area and yield.

  - **India** — Production is estimated at 5.4 million tons, up 0.4 million or 8 percent from last month and unchanged from last year's record crop. Rapeseed area is forecast to rise by 2 percent owing to oilseed price incentives and diversion of some wheat areas into rapeseed.

  - **Canada** — Production is estimated at 4.3 million tons, up 0.1 million or 2 percent above last month and up 31 percent from last year. The near record crop stems from a 27 percent increase in area.

* **Flaxseed:** World production for 1991/92 is forecast at 2.0 million tons, down marginally from last month and down 13 percent from last year. While production in the United States is small, this year's output is expected to increase by 18 percent over last year to 114,000 tons. Total foreign production is pegged at 1.9 million tons, down marginally from last month and down 14 percent from 1990/91. There were no significant country changes this month.

* **Copra:** World production for 1991/92 is forecast at 4.6 million tons, unchanged from last month, but down 3 percent from last year. Copra production reached a record 5.3 million tons in 1985/86. There were no country changes this month.

* **Palm Kernels:** World production for 1991/92 is forecast at a record 3.6 million tons, unchanged from last month, but up 9 percent from last year. There were no country changes this month.

* **Palm Oil:** World production for 1991/92 is forecast at a record 11.9 million tons, unchanged from last month, but up 8 percent from last year. There were no country changes this month.

COTTON: World cotton production in 1991/92 is projected at a record 90.5 million bales. This estimate is down 1.1 million bales or 1 percent from last month, but up 3.5 million bales or 4 percent from 1990/91. This estimate remains above the previous record of 89.0 million bales harvested in 1984/85. Total foreign production is projected at 72.5 million bales, down 0.9 million bales or 1 percent from last month, but is a gain of 1 percent over 1990/91 and second only to the 1984/85 record crop of 76.0 million bales. Country highlights are as follows:

- **United States** — Production is estimated at 18.0 million bales, down 0.2 million or 1 percent from last month, but 16 percent above last year. If realized, this will be the largest crop since 1937/38 when output hit 18.9 million bales. Cold wet weather during the late season crop development stage reduced yield prospects in Texas and Oklahoma, while improved conditions in several states, mainly California and Mississippi, increased output. The increase in these two states along with smaller increases in others partially offset the drop in output for Texas.

- **India** — Production is estimated at 9.5 million bales, down 0.5 million or 6 percent from last month, but up 3 percent from last year's rain-damaged crop. Cotton yield is estimated down this month owing to drought effects in important central Indian growing states. Harvested area is also estimated down slightly due to reduced plantings in the drought affected states.

- **Australia** — Production is estimated at 1.7 million bales, down 0.2 million or 13 percent from last month and down 17 percent from last year's record harvest. Cotton area is estimated down owing to a loss of dryland plantings, while yield is estimated down due to drought effects and potential irrigation supply shortages.

- **Paraguay** — Production is forecast at 1.1 million bales, down 0.1 million or 9 percent from last month and down 12 percent from last year. Planted area is projected to decrease as producers respond to unfavorable government price supports, expensive credit, and low world cotton prices.

- **Pakistan** — Production is estimated at a record 8.0 million bales, up 0.2 million or 3 percent from last month and up 6 percent from last year. Cotton area and yield are estimated above 1990/91 levels, as strong domestic demand influenced growers to expand production and use higher levels of crop inputs.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	1991/92	1989/90	1990/91	Nov.	Dec.	1989/90	1990/91	Nov.	Dec.
	--Million Acres--			--Million Acres--			--Bushels per Acre--				--Million Bushels--			
All Wheat	76.6	77.2	69.9	62.2	69.3	57.7	32.7	39.5	34.3	34.3	2,037	2,736	1,981	1,981
Winter	55.1	56.9	51.0	41.5	49.9	39.4	35.0	40.7	34.8	34.8	1,455	2,031	1,372	1,372
Other	21.5	20.3	18.9	20.7	19.4	18.3	28.1	36.4	33.3	33.3	582	706	609	609
Rye	2.0	1.6	1.7	0.5	0.4	0.4	28.2	27.1	24.6	24.6	14	10	10	10
Soybeans	60.8	57.8	59.8	59.5	56.5	58.6	32.3	34.1	33.5	33.5	1,924	1,926	1,962	1,962
Corn	72.2	74.2	75.9	64.7	67.0	68.7	116.3	118.5	108.9	108.9	7,525	7,933	7,486	7,486
Sorghum	12.6	10.5	11.0	11.1	9.1	9.7	55.4	62.9	59.4	59.4	615	571	578	578
Barley	9.1	8.2	8.9	8.3	7.5	8.4	48.6	56.1	55.2	55.2	404	422	464	464
Oats	12.1	10.4	8.7	6.9	5.9	4.8	54.3	60.1	50.6	50.6	374	358	243	243
							--Pounds per Acre--				--Million CWT--			
Rice	2.7	2.9	2.9	2.7	2.8	2.8	5,749	5,507	5,616	5,616	154.5	154.9	159.0	159.0
											--Million 480-Pound--			
All Cotton	10.6	12.3	14.1	9.5	11.7	13.3	614	634	649	648	12.2	15.5	18.2	18.0

1/ All estimates are from the USDA, National Agricultural Statistics Service (NASS) and are published in the Crop Production circular available from NASS.

TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			USSR	Asia					South America		Selected Other			All Other Countries
			United States	Canada	Mexico	EC-12	Oth. W. Europe	Eastern Europe		China	India	Indo-nesia	Paki-stan	Thai-land	Argen-tina	Brazil	Aus-tralia	South Africa	Turkey	
	—Million Metric Tons—																			
Wheat																				
1989/90	537.9	482.4	55.4	24.6	4.0	82.0	4.4	40.7	92.3	90.8	54.1	0.0	14.4	0.0	10.2	5.6	14.2	2.0	12.5	15.4
1990/91 prel.	593.1	518.6	74.5	32.7	3.9	84.6	5.1	41.1	108.0	98.2	49.7	0.0	14.3	0.0	10.5	3.2	15.1	1.7	15.0	17.7
1991/92 proj.																				
November	547.4	493.5	53.9	33.0	3.7	90.3	4.0	40.7	78.0	96.0	54.0	0.0	14.5	0.0	9.0	3.2	10.0	2.1	16.0	18.1
December	545.4	491.5	53.9	32.8	3.7	90.4	4.1	39.2	78.0	96.0	54.0	0.0	14.5	0.0	8.5	3.2	10.0	2.3	16.0	17.9
Coarse Grains																				
1989/90	802.7	581.3	221.4	23.5	14.1	89.8	12.4	60.2	104.8	93.5	34.6	5.0	2.7	4.3	8.3	22.5	6.9	9.5	7.5	81.7
1990/91 prel.	833.4	602.7	230.7	25.4	18.4	84.1	13.7	52.2	113.3	113.5	33.3	5.2	2.9	4.1	11.2	24.2	6.7	8.8	8.9	77.0
1991/92 proj.																				
November	801.5	582.8	218.7	23.5	18.0	88.2	12.0	61.5	85.5	106.6	31.5	5.2	2.5	4.0	10.5	26.7	6.9	8.6	9.7	81.9
December	803.8	585.0	218.7	22.7	17.5	88.3	12.1	61.3	85.5	110.6	31.5	5.2	2.5	4.0	10.5	26.7	6.4	8.6	9.7	82.0
Rice (Milled)																				
1989/90	344.5	339.4	5.1	0.0	0.4	1.4	0.0	0.1	1.7	126.1	74.1	29.1	3.2	13.3	0.2	4.9	0.6	0.0	0.2	23.1
1990/91 prel.	352.3	347.2	5.1	0.0	0.2	1.6	0.0	0.1	1.6	132.5	74.6	29.4	3.3	11.4	0.2	6.3	0.6	0.0	0.2	23.7
1991/92 proj.																				
November	345.6	340.6	5.0	0.0	0.2	1.5	0.0	0.1	1.4	129.5	71.5	28.7	3.3	13.2	0.2	6.8	0.8	0.0	0.1	23.2
December	344.9	339.9	5.0	0.0	0.2	1.5	0.0	0.1	1.4	129.5	71.5	28.7	3.3	13.2	0.2	6.8	0.8	0.0	0.1	23.2
Total Grains 1/																				
1989/90	1,685.1	1,403.2	281.9	48.0	18.5	173.2	16.8	101.0	198.8	310.4	162.7	34.1	20.4	17.6	18.7	33.0	21.7	11.5	20.2	196.6
1990/91 prel.	1,778.7	1,468.5	310.2	58.1	22.5	170.3	18.7	93.5	222.9	344.2	157.5	34.6	20.5	15.5	22.0	33.7	22.3	10.5	24.1	197.8
1991/92 proj.																				
November	1,694.6	1,416.9	277.7	56.5	21.9	179.9	16.0	102.4	164.9	332.1	157.0	33.9	20.3	17.2	19.7	36.7	17.7	10.7	25.9	204.2
December	1,694.1	1,416.4	277.7	55.5	21.4	180.2	16.2	100.6	164.9	336.1	157.0	33.9	20.2	17.2	19.2	36.7	17.2	10.9	25.9	203.4
Oilseeds 2/																				
1989/90	214.1	154.8	59.3	4.9	1.4	11.5	0.7	5.2	13.8	28.5	19.3	2.2	3.3	0.9	15.8	21.8	0.7	1.0	2.3	21.5
1990/91 prel.	217.6	157.0	60.6	5.6	1.0	13.1	0.7	4.3	13.0	33.3	21.0	2.2	3.6	0.7	16.1	17.0	2.0	1.0	1.9	20.3
1991/92 proj.																				
November	222.4	158.7	63.7	6.2	1.1	13.6	0.7	4.2	12.1	32.5	21.5	2.2	3.8	0.7	15.5	19.1	1.0	1.0	1.6	21.9
December	222.5	158.8	63.7	6.5	1.1	13.7	0.7	4.2	12.1	32.7	21.1	2.2	3.9	0.7	15.5	19.1	0.9	1.0	1.6	21.8
	—Million 480-Pound Bales—																			
Cotton																				
1989/90	80.0	67.8	12.2	0.0	0.8	1.5	0.0	0.1	12.3	17.4	10.6	0.0	6.7	0.1	1.3	3.0	1.4	0.3	2.8	9.5
1990/91 prel.	87.1	71.6	15.5	0.0	0.8	1.4	0.0	0.1	12.0	20.7	9.1	0.0	7.5	0.1	1.4	3.2	2.0	0.2	3.0	10.0
1991/92 proj.																				
November	91.6	73.4	18.2	0.0	0.9	1.3	0.0	0.1	11.0	22.0	10.0	0.0	7.8	0.2	1.5	3.5	1.9	0.3	2.7	10.3
December	90.5	72.5	18.0	0.0	0.8	1.3	0.0	0.1	11.0	22.0	9.5	0.0	8.0	0.2	1.5	3.5	1.7	0.3	2.7	10.2

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains and pulses are 210.9 million tons in 1989/90, 235.0 million in 1990/91, and 175.0 million projected for 1991/92.
2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also includes copra and palm kernels for all countries.
Note: Entries of 0.0 indicate no reported or insignificant production.

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TABLE 3

Wheat Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. Nov.	Dec.	1989/90	Prel. 1990/91	1991/92 Proj. Nov.	Dec.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	226.4	232.1	223.3	2.38	2.56	2.45	2.44	537.9	593.1	547.4	545.4
United States	25.2	28.0	23.3	2.20	2.66	2.31	2.31	55.4	74.5	53.9	53.9
Total Foreign	201.3	204.1	199.9	2.40	2.54	2.47	2.46	482.4	518.6	493.5	491.5
Maj. Foreign Exporters	45.1	45.8	43.9	2.91	3.12	3.22	3.23	131.0	142.9	142.3	141.7
Argentina	5.5	5.7	4.5	1.86	1.84	1.84	1.89	10.2	10.5	9.0	8.5
Australia	9.0	9.2	7.8	1.58	1.63	1.28	1.28	14.2	15.1	10.0	10.0
Canada	13.6	14.4	14.5	1.80	2.27	2.24	2.26	24.6	32.7	33.0	32.8
EC-12	17.0	16.5	17.1	4.83	5.14	5.39	5.28	82.0	84.6	90.3	90.4
Major Importers	96.6	98.4	95.8	2.48	2.66	2.42	2.40	239.1	261.4	231.7	230.2
Brazil	3.4	3.3	2.4	1.65	0.97	1.33	1.33	5.6	3.2	3.2	3.2
China	29.8	30.8	30.9	3.04	3.19	3.10	3.10	90.8	98.2	96.0	96.0
Eastern Europe	9.8	9.7	10.0	4.14	4.22	4.11	3.93	40.7	41.1	40.7	39.2
Egypt	0.6	0.7	0.8	5.05	5.79	6.40	6.40	3.2	4.3	4.8	4.8
Other N. Africa 1/	4.9	5.4	5.6	1.14	1.04	1.50	1.50	5.6	5.7	8.3	8.4
Japan	0.3	0.3	0.2	3.47	3.66	2.93	2.93	1.0	1.0	0.7	0.7
USSR	47.7	48.2	46.0	1.94	2.24	1.70	1.70	92.3	108.0	78.0	78.0
Other Foreign	59.7	59.8	60.1	1.88	1.91	1.99	1.99	112.3	114.3	119.5	119.6
India	24.1	23.5	24.3	2.24	2.12	2.22	2.22	54.1	49.7	54.0	54.0
Iran	6.8	6.5	6.2	0.81	1.08	1.15	1.15	5.5	7.0	7.1	7.1
Mexico	1.0	1.0	0.9	4.21	4.11	4.20	4.20	4.0	3.9	3.7	3.7
Non-EC W. Europe	0.8	0.9	0.8	5.18	5.41	5.18	5.22	4.4	5.1	4.0	4.1
Pakistan	7.7	7.8	8.0	1.87	1.82	1.82	1.82	14.4	14.3	14.5	14.5
South Africa	1.8	1.6	1.4	1.11	1.10	1.48	1.61	2.0	1.7	2.1	2.3
Turkey	8.7	8.8	8.9	1.44	1.71	1.80	1.80	12.5	15.0	16.0	16.0
Others	8.7	9.8	9.8	1.77	1.79	1.84	1.83	15.4	17.7	18.1	17.9

1/ Algeria, Libya, Morocco, and Tunisia.

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TABLE 4

Coarse Grains Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Nov.	Dec.	1989/90	1990/91	Nov.	Dec.
TOTAL COARSE GRAINS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World 1/	323.0	317.9	321.7	2.49	2.62	2.49	2.50	802.7	833.4	801.5	803.8
United States	37.0	36.4	37.3	5.98	6.34	5.87	5.87	221.4	230.7	218.7	218.7
Total Foreign	285.9	281.5	284.4	2.03	2.14	2.05	2.06	581.3	602.7	582.8	585.0
Maj. Foreign Exporters	21.1	20.3	20.9	2.49	2.77	2.50	2.50	52.5	56.2	53.5	52.1
Argentina	3.2	3.3	3.7	2.64	3.43	2.88	2.88	8.3	11.2	10.5	10.5
Australia	3.9	4.1	4.8	1.77	1.64	1.45	1.32	6.9	6.7	6.9	6.4
Canada	8.3	7.6	6.9	2.84	3.32	3.15	3.29	23.5	25.4	23.5	22.7
South Africa	4.2	3.8	4.0	2.24	2.34	2.15	2.15	9.5	8.8	8.6	8.6
Thailand	1.6	1.5	1.5	2.78	2.65	2.65	2.65	4.3	4.1	4.0	4.0
Major Importers	103.8	99.8	101.9	2.73	2.84	2.63	2.61	282.9	283.2	266.7	266.2
Eastern Europe	16.5	15.9	16.4	3.66	3.28	3.81	3.74	60.2	52.2	61.5	61.3
EC-12	20.3	19.3	19.2	4.43	4.35	4.60	4.61	89.8	84.1	88.2	88.3
Other W. Europe	3.1	3.0	2.9	3.98	4.49	4.19	4.24	12.4	13.7	12.0	12.1
Mexico	7.5	8.2	8.9	1.88	2.23	2.09	1.97	14.1	18.4	18.0	17.5
USSR	56.0	52.9	54.2	1.87	2.14	1.58	1.58	104.8	113.3	85.5	85.5
Other Major Import. 2/	0.4	0.4	0.4	3.83	3.63	3.70	3.70	1.6	1.5	1.5	1.5
Other Foreign	161.0	161.4	161.6	1.53	1.63	1.63	1.65	245.8	263.4	262.6	266.7
Brazil	12.5	13.5	13.5	1.79	1.79	1.98	1.98	22.5	24.2	26.7	26.7
China	28.2	29.1	29.1	3.31	3.90	3.66	3.80	93.5	113.5	106.6	110.6
India	37.7	36.8	36.7	0.92	0.90	0.86	0.86	34.6	33.3	31.5	31.5
Indonesia	2.7	2.9	2.9	1.85	1.82	1.79	1.79	5.0	5.2	5.2	5.2
Nigeria	9.9	9.5	9.9	0.82	0.67	0.84	0.84	8.1	6.3	8.3	8.3
Philippines	3.6	3.9	3.9	1.22	1.32	1.24	1.24	4.4	5.1	4.9	4.9
Turkey	4.4	4.5	4.5	1.70	1.99	2.17	2.17	7.5	8.9	9.7	9.7
Others	61.9	61.3	61.1	1.14	1.09	1.14	1.14	70.3	67.0	69.8	69.8
BARLEY											
World	74.9	75.1	77.4	2.27	2.48	2.20	2.20	170.1	186.3	170.9	170.1
United States	3.4	3.0	3.4	2.62	3.02	2.97	2.97	8.8	9.2	10.1	10.1
Total Foreign	71.5	72.1	74.0	2.26	2.46	2.17	2.16	161.3	177.1	160.7	160.0
Australia	2.3	2.5	2.8	1.75	1.62	1.39	1.31	4.0	4.1	3.9	3.7
Canada	4.7	4.7	4.5	2.50	2.96	2.79	2.78	11.7	13.9	13.0	12.5
China	3.3	3.3	3.3	1.74	1.73	1.73	1.73	5.7	5.7	5.7	5.7
Eastern Europe	3.6	3.6	3.8	4.03	4.00	3.84	3.74	14.5	14.3	14.5	14.3
EC-12	12.6	12.3	12.1	4.05	4.12	4.20	4.21	51.0	50.8	50.9	51.0
Other W. Europe	1.5	1.5	1.5	3.87	4.37	3.90	3.99	5.9	6.4	6.0	6.1
Turkey	3.4	3.4	3.4	1.46	1.76	2.00	2.00	4.9	6.0	6.8	6.8
USSR	27.6	26.1	28.5	1.75	2.34	1.51	1.51	48.5	61.0	43.0	43.0
Others	12.6	14.7	14.0	1.20	1.01	1.21	1.21	15.1	14.8	17.0	17.0

FOOTNOTES AT END OF TABLE

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TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Nov.	Dec.	1989/90	1990/91	Nov.	Dec.
CORN	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	126.5	127.3	131.2	3.66	3.76	3.67	3.68	462.5	479.2	478.4	483.1
United States	26.2	27.1	27.8	7.30	7.44	6.84	6.84	191.2	201.5	190.2	190.2
Total Foreign	100.3	100.2	103.4	2.70	2.77	2.81	2.83	271.3	277.7	288.2	293.0
Maj. Foreign Exporters	6.6	6.3	6.8	2.77	3.14	2.79	2.79	18.2	19.8	18.9	18.9
Argentina	1.7	2.0	2.2	3.06	4.00	3.27	3.27	5.2	7.8	7.2	7.2
South Africa	3.5	3.0	3.3	2.56	2.73	2.46	2.46	8.9	8.2	8.0	8.0
Thailand	1.4	1.4	1.3	2.93	2.81	2.80	2.80	4.1	3.8	3.7	3.7
Major Importers	21.2	19.7	22.2	3.93	3.50	3.94	3.82	83.4	68.9	84.8	84.8
Eastern Europe	7.1	6.5	6.8	4.14	3.26	4.69	4.55	29.2	21.1	30.9	30.9
EC-12	3.9	3.4	3.9	6.91	6.27	6.71	6.71	26.9	21.6	26.1	26.1
Other W. Europe	0.2	0.2	0.2	7.83	7.98	8.34	8.34	1.8	1.8	1.8	1.8
Mexico	5.8	6.6	7.7	1.68	2.14	2.01	1.88	9.8	14.1	14.5	14.5
USSR	4.1	2.8	3.5	3.71	3.50	3.14	3.14	15.3	9.8	11.0	11.0
Other Maj. Import. 2/	0.1	0.1	0.1	4.28	4.10	4.18	4.18	0.5	0.5	0.5	0.5
Other Foreign	72.5	74.2	74.4	2.34	2.55	2.48	2.54	169.8	189.0	184.5	189.2
Brazil	12.1	13.0	13.0	1.80	1.81	2.00	2.00	21.8	23.5	26.0	26.0
Canada	1.0	1.0	1.1	6.36	6.91	6.06	6.75	6.4	7.2	6.6	7.3
China	20.4	21.4	21.5	3.88	4.52	4.23	4.41	78.9	96.8	91.0	95.0
Egypt	0.8	0.8	0.9	5.37	5.43	5.59	5.59	4.5	4.6	4.8	4.8
India	5.9	6.1	5.7	1.61	1.54	1.47	1.47	9.4	9.4	8.4	8.4
Indonesia	2.7	2.9	2.9	1.85	1.82	1.79	1.79	5.0	5.2	5.2	5.2
Philippines	3.6	3.9	3.9	1.22	1.32	1.24	1.24	4.4	5.1	4.9	4.9
Zimbabwe	1.2	1.1	1.2	1.72	1.45	1.67	1.67	2.0	1.6	2.0	2.0
Others	24.9	24.1	24.2	1.50	1.48	1.47	1.47	37.3	35.6	35.7	35.7
SORGHUM											
World	41.7	39.2	39.7	1.32	1.35	1.33	1.32	55.0	53.1	53.0	52.4
United States	4.5	3.7	3.9	3.48	3.95	3.73	3.73	15.6	14.5	14.7	14.7
Total Foreign	37.2	35.6	35.8	1.06	1.08	1.06	1.05	39.4	38.6	38.3	37.7
Argentina	0.7	0.7	0.8	2.86	3.57	2.95	2.95	2.0	2.5	2.3	2.3
Australia	0.4	0.4	0.6	2.49	2.22	1.75	1.71	0.9	0.9	1.0	1.0
China	1.6	1.5	1.5	2.72	3.71	3.47	3.47	4.4	5.7	5.2	5.2
India	14.9	14.8	15.0	0.86	0.82	0.80	0.80	12.9	12.1	12.0	12.0
Mexico	1.3	1.3	0.9	2.88	2.85	2.73	2.78	3.8	3.7	3.0	2.5
Nigeria	4.4	4.4	4.4	0.80	0.64	0.80	0.80	3.5	2.8	3.5	3.5
South Africa	0.2	0.2	0.2	1.11	1.12	1.11	1.11	0.3	0.2	0.3	0.3
Sudan	4.0	3.0	3.0	0.45	0.50	0.50	0.50	1.8	1.5	1.5	1.5
Thailand	0.2	0.2	0.2	1.44	1.39	1.47	1.47	0.2	0.3	0.3	0.3
Others	9.4	9.1	9.3	1.02	0.98	1.00	1.00	9.6	8.9	9.3	9.3

FOOTNOTES AT END OF TABLE

December 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Nov.	Dec.	1989/90	1990/91	Nov.	Dec.
OATS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	22.6	21.3	20.4	1.84	1.98	1.71	1.68	41.4	42.2	35.1	34.3
United States	2.8	2.4	1.9	1.95	2.16	1.81	1.81	5.4	5.2	3.5	3.5
Total Foreign	19.8	18.9	18.4	1.82	1.96	1.70	1.67	36.0	37.0	31.6	30.8
USSR	10.8	10.7	10.7	1.57	1.68	1.36	1.36	16.8	18.0	14.5	14.5
Maj. Foreign Exporters	3.6	2.9	2.9	2.00	2.16	2.00	1.81	7.3	6.4	6.0	5.3
Argentina	0.4	0.3	0.4	1.44	1.34	1.29	1.29	0.6	0.4	0.5	0.5
Australia	1.1	1.1	1.3	1.51	1.43	1.38	1.14	1.6	1.5	1.8	1.5
Canada	1.7	1.2	0.9	2.08	2.34	2.32	2.14	3.5	2.9	2.3	1.9
Sweden	0.4	0.4	0.3	3.54	4.42	4.09	4.09	1.5	1.6	1.4	1.4
Other Foreign	5.4	5.3	4.8	2.21	2.40	2.28	2.28	11.9	12.6	11.1	11.0
China	0.6	0.6	0.6	1.20	1.21	1.18	1.18	0.7	0.7	0.7	0.7
Eastern Europe	1.2	1.2	1.2	2.55	2.70	2.55	2.54	3.2	3.3	3.0	3.0
Czechoslovakia	0.1	0.1	0.1	3.24	4.55	4.00	4.00	0.3	0.4	0.4	0.4
Poland	0.8	0.7	0.7	2.72	2.84	2.67	2.65	2.2	2.1	1.9	1.9
EC-12	1.8	1.6	1.4	2.74	3.07	3.06	3.09	4.8	5.1	4.4	4.4
France	0.3	0.2	0.2	3.73	3.86	3.81	3.81	1.0	0.9	0.8	0.8
Germany	0.6	0.6	0.4	3.58	3.93	4.92	4.92	2.0	2.4	1.9	1.9
Finland	0.4	0.5	0.3	3.24	3.67	3.23	3.23	1.4	1.7	1.1	1.1
Norway	0.1	0.1	0.1	3.13	4.38	4.00	3.97	0.4	0.6	0.5	0.5
Others	1.3	1.3	1.2	1.11	1.09	1.16	1.16	1.4	1.4	1.4	1.4
RYE											
World	16.9	16.6	13.9	2.22	2.33	2.09	2.09	37.6	38.7	29.1	29.1
United States	0.2	0.2	0.2	1.77	1.70	1.55	1.55	0.3	0.3	0.2	0.2
Total Foreign	16.7	16.4	13.7	2.23	2.34	2.10	2.10	37.2	38.5	28.9	28.8
USSR	10.7	10.4	8.5	1.87	2.02	1.59	1.59	20.1	21.0	13.5	13.5
Maj. Foreign Exporter											
Canada	0.5	0.4	0.2	1.74	1.70	1.78	1.86	0.9	0.7	0.4	0.4
Other Foreign											
Eastern Europe	3.3	3.4	3.4	2.94	2.88	2.82	2.82	9.7	9.9	9.5	9.5
Hungary	0.1	0.1	0.1	2.06	2.46	2.40	2.40	0.2	0.2	0.2	0.2
Poland	2.9	3.1	3.0	2.95	2.86	2.82	2.82	8.6	8.8	8.5	8.5
Czechoslovakia	0.2	0.2	0.2	4.05	4.26	3.82	3.82	0.7	0.7	0.7	0.7
EC-12	1.6	1.6	1.2	3.32	3.40	3.65	3.66	5.2	5.4	4.5	4.5
Denmark	0.1	0.1	0.1	4.82	4.95	4.57	4.57	0.5	0.5	0.4	0.4
Germany	1.0	1.0	0.7	3.86	3.87	4.66	4.66	3.9	4.0	3.3	3.3
Others	0.6	0.6	0.5	2.29	2.38	2.20	2.21	1.3	1.5	1.0	1.0

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.
2/ Japan, Republic of Korea, and Taiwan.

December 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 5

Rice Area, Yield, and Production
World and Selected Countries and Regions

	AREA			YIELD				PRODUCTION (Rough Basis)				MILLING RATE				PRODUCTION (Milled Basis)			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.			Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Nov.	Dec.	1989/90	1990/91	Nov.	Dec.	1989/90	1990/91	Nov.	Dec.	1989/90	1990/91	Nov.	Dec.
	—Million Hectares—			—Metric Tons Per Hectare—				—Million Metric Tons—				—In Percent—				—Million Metric Tons—			
World	146.4	147.1	145.9	3.5	3.5	3.5	3.5	508.6	519.8	510.1	509.2	67.7	67.8	67.7	67.7	344.5	352.3	345.6	344.9
United States	1.1	1.1	1.1	6.4	6.2	6.3	6.3	7.0	7.0	7.2	7.2	72.6	72.0	70.0	70.0	5.1	5.1	5.0	5.0
Total Foreign	145.3	145.9	144.7	3.5	3.5	3.5	3.5	501.6	512.8	502.9	501.9	67.7	67.7	67.7	67.5	339.4	347.2	340.6	339.9
Maj. Foreign Exporters	16.8	16.6	16.6	2.3	2.2	2.3	2.3	38.5	35.9	37.6	37.5	64.0	63.8	64.1	64.1	24.6	22.9	24.1	24.0
Burma	4.7	4.8	4.5	2.9	2.9	2.8	2.8	13.5	13.7	12.6	12.6	60.0	60.0	60.0	60.0	8.1	8.2	7.6	7.6
Pakistan	2.1	2.1	2.1	2.3	2.3	2.3	2.4	4.8	4.9	5.0	4.9	66.7	66.7	66.7	66.7	3.2	3.3	3.3	3.3
Thailand	10.0	9.7	10.0	2.0	1.8	2.0	2.0	20.2	17.3	20.0	20.0	66.0	66.0	66.0	66.0	13.3	11.4	13.2	13.2
Major Importers	13.9	13.9	13.5	4.2	4.2	4.2	4.2	58.6	58.4	56.9	56.9	66.1	66.0	66.0	66.0	38.7	38.6	37.5	37.5
EC-12	0.3	0.4	0.4	6.2	6.4	6.0	6.0	2.1	2.4	2.2	2.2	67.0	67.4	67.3	67.3	1.4	1.6	1.5	1.5
Indonesia	10.5	10.5	10.1	4.2	4.3	4.4	4.4	44.7	45.2	44.1	44.1	65.0	65.0	65.0	65.0	29.1	29.4	28.7	28.7
Nigeria	0.6	0.7	0.7	1.4	1.4	1.4	1.4	0.9	0.9	0.9	0.9	60.0	60.0	60.0	60.0	0.5	0.6	0.6	0.6
Republic of Korea	1.3	1.2	1.2	6.5	6.2	6.1	6.1	8.1	7.7	7.4	7.4	72.5	72.5	72.5	72.5	5.9	5.6	5.3	5.3
Other Maj. Import. 1/	1.2	1.1	1.1	2.4	1.9	2.0	2.0	2.8	2.2	2.2	2.2	65.5	65.4	65.8	65.8	1.8	1.4	1.5	1.5
Other Foreign	114.6	115.4	114.7	3.5	3.6	3.6	3.6	404.5	418.5	408.5	407.6	68.3	68.3	68.3	68.3	276.0	285.7	279.0	278.3
Australia	0.1	0.1	0.1	8.0	8.8	8.4	8.4	0.8	0.8	1.1	1.1	71.5	71.5	71.5	71.5	0.6	0.6	0.8	0.8
Bangladesh	10.5	10.4	10.5	2.6	2.6	2.6	2.6	26.8	26.9	27.6	27.6	66.7	66.7	66.7	66.7	17.9	17.9	18.4	18.4
Brazil	4.3	4.5	5.3	1.7	2.1	1.9	1.9	7.2	9.3	10.0	10.0	68.0	68.0	68.0	68.0	4.9	6.3	6.8	6.8
China	32.7	33.1	32.8	5.5	5.7	5.6	5.6	180.1	189.3	185.0	185.0	70.0	70.0	70.0	70.0	126.1	132.5	129.5	129.5
India	42.2	42.6	41.1	2.6	2.6	2.6	2.6	111.1	111.9	107.3	107.3	66.7	66.7	66.7	66.7	74.1	74.6	71.5	71.5
Japan	2.1	2.1	2.0	6.2	6.3	6.2	5.9	12.9	13.1	12.9	12.1	72.8	72.8	72.8	72.8	9.4	9.6	9.4	8.8
Philippines	3.4	3.4	3.3	2.6	2.9	2.8	2.8	8.9	9.9	9.3	9.3	65.0	65.0	65.0	65.0	5.8	6.4	6.0	6.0
USSR	0.7	0.6	0.6	3.9	4.0	3.7	3.7	2.6	2.4	2.2	2.2	65.0	65.0	65.0	65.0	1.7	1.6	1.4	1.4
Vietnam	5.7	5.7	5.9	3.3	3.3	3.0	3.0	19.0	19.0	18.0	18.0	66.0	66.0	66.0	66.0	12.5	12.5	11.9	11.9
Others	12.9	13.0	12.9	2.7	2.8	2.7	2.7	35.0	35.8	35.1	35.1	66.1	66.2	66.2	66.2	23.1	23.7	23.2	23.2

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Nov.	Dec.	1989/90	1990/91	Nov.	Dec.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SOYBEANS											
World	58.25	54.05	55.20	1.84	1.91	1.90	1.90	107.26	103.00	105.28	105.08
United States	24.09	22.87	23.73	2.17	2.29	2.25	2.25	52.35	52.42	53.39	53.39
Total Foreign	34.15	31.18	31.47	1.61	1.62	1.64	1.64	54.91	50.58	51.89	51.69
Maj. Foreign Exporters	16.35	14.40	15.00	1.90	1.83	1.88	1.88	31.09	26.30	28.25	28.25
Argentina	4.95	4.75	5.00	2.17	2.27	2.15	2.15	10.75	10.80	10.75	10.75
Brazil	11.40	9.65	10.00	1.78	1.61	1.75	1.75	20.34	15.50	17.50	17.50
Other Foreign	17.80	16.78	16.47	1.34	1.45	1.42	1.42	23.82	24.28	23.64	23.44
Canada	0.54	0.49	0.58	2.26	2.63	2.14	2.44	1.22	1.29	1.23	1.41
China	8.06	7.56	7.20	1.27	1.46	1.39	1.40	10.23	11.00	10.00	10.10
Eastern Europe	0.70	0.34	0.25	0.97	1.07	1.35	1.35	0.68	0.36	0.33	0.33
EC-12	0.63	0.69	0.54	3.13	3.09	3.11	3.11	1.98	2.14	1.71	1.68
India	2.13	2.39	2.50	0.80	1.02	1.02	0.92	1.72	2.44	2.70	2.30
Indonesia	1.21	1.22	1.24	1.09	1.08	1.04	1.04	1.32	1.32	1.29	1.29
Paraguay	0.98	0.89	0.90	1.61	1.46	1.78	1.78	1.58	1.30	1.60	1.60
USSR	0.83	0.83	0.81	1.15	1.06	1.14	1.14	0.96	0.88	0.92	0.92
Others	2.73	2.37	2.46	1.52	1.50	1.55	1.55	4.15	3.56	3.86	3.81
COTTONSEED											
World	32.27	33.27	34.22	0.96	1.01	1.02	1.01	30.95	33.57	34.90	34.56
United States	3.86	4.75	5.39	1.10	1.14	1.17	1.17	4.24	5.41	6.38	6.30
Total Foreign	28.41	28.53	28.83	0.94	0.99	0.99	0.98	26.71	28.15	28.52	28.26
China	5.20	5.59	6.00	1.24	1.37	1.36	1.36	6.44	7.66	8.16	8.16
India	7.53	7.36	7.27	0.58	0.53	0.59	0.56	4.40	3.90	4.30	4.10
Pakistan	2.60	2.69	2.78	1.12	1.21	1.23	1.25	2.91	3.27	3.40	3.48
USSR	3.33	3.15	3.01	1.53	1.56	1.46	1.46	5.11	4.92	4.40	4.40
Others	9.74	9.74	9.78	0.81	0.86	0.84	0.83	7.85	8.40	8.26	8.12
PEANUTS											
World	19.81	20.01	20.20	1.11	1.14	1.16	1.15	22.05	22.88	23.51	23.29
United States	0.67	0.73	0.80	2.72	2.23	2.82	2.82	1.81	1.63	2.24	2.24
Total Foreign	19.15	19.28	19.41	1.06	1.10	1.10	1.08	20.24	21.25	21.27	21.05
Argentina	0.18	0.20	0.19	1.87	2.37	2.11	2.11	0.34	0.48	0.40	0.40
China	2.96	2.91	2.92	1.81	2.19	2.09	2.09	5.37	6.37	6.10	6.10
India	8.71	8.65	8.70	0.93	0.93	0.94	0.92	8.09	8.08	8.20	8.00
Senegal	0.78	0.92	0.90	1.04	0.73	0.77	0.77	0.82	0.67	0.70	0.70
South Africa	0.09	0.09	0.09	1.28	1.59	1.50	1.50	0.11	0.14	0.14	0.14
Sudan	0.55	0.54	0.53	0.73	0.60	0.75	0.75	0.40	0.33	0.40	0.40
Others	5.88	5.98	6.08	0.87	0.87	0.88	0.88	5.12	5.19	5.34	5.32

TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Nov.	Dec.	1989/90	1990/91	Nov.	Dec.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SUNFLOWERSEED											
World	15.87	16.29	16.46	1.38	1.38	1.30	1.31	21.85	22.53	21.36	21.55
United States	0.72	0.75	1.02	1.10	1.38	1.46	1.46	0.80	1.03	1.50	1.50
Total Foreign	15.15	15.54	15.44	1.39	1.38	1.29	1.30	21.06	21.50	19.86	20.05
Argentina	2.80	2.30	2.50	1.36	1.70	1.40	1.40	3.80	3.90	3.50	3.50
China	0.72	0.71	0.71	1.49	1.88	1.62	1.76	1.06	1.34	1.15	1.25
EC-12	2.13	2.58	2.41	1.67	1.64	1.67	1.69	3.54	4.23	3.99	4.06
East Europe	1.27	1.23	1.24	1.81	1.70	1.78	1.71	2.29	2.09	2.15	2.13
USSR	4.46	4.67	4.60	1.59	1.41	1.30	1.30	7.07	6.56	6.00	6.00
Others	3.78	4.06	3.98	0.87	0.83	0.77	0.78	3.30	3.38	3.07	3.11
RAPESEED											
World	17.12	18.24	20.00	1.28	1.39	1.37	1.39	21.86	25.37	27.22	27.82
United States 1/	0.03	0.03	0.06	1.58	1.74	1.75	1.75	0.05	0.05	0.11	0.11
Total Foreign	17.09	18.21	19.94	1.28	1.39	1.36	1.39	21.80	25.32	27.12	27.71
Canada	2.90	2.58	3.27	1.07	1.27	1.28	1.32	3.10	3.28	4.20	4.30
China	4.99	5.50	6.10	1.09	1.26	1.16	1.16	5.44	6.96	7.10	7.10
EC-12	1.81	2.13	2.42	2.96	2.89	3.00	3.05	5.34	6.14	7.29	7.39
East Europe	0.81	0.74	0.69	2.66	2.38	2.41	2.41	2.15	1.75	1.66	1.66
India	4.99	5.72	5.80	0.83	0.94	0.88	0.93	4.12	5.40	5.00	5.40
Others	1.59	1.54	1.66	1.04	1.16	1.09	1.12	1.66	1.78	1.87	1.86
FLAXSEED											
World	3.74	3.76	3.37	0.50	0.61	0.60	0.60	1.85	2.30	2.02	2.01
United States	0.07	0.10	0.12	0.47	0.95	0.97	0.97	0.03	0.10	0.11	0.11
Total Foreign	3.67	3.66	3.25	0.50	0.60	0.58	0.58	1.82	2.20	1.90	1.89
Argentina	0.58	0.58	0.42	0.90	0.83	0.86	0.86	0.52	0.48	0.36	0.36
Canada	0.60	0.73	0.53	0.83	1.29	1.30	1.30	0.50	0.94	0.70	0.69
India	1.18	1.17	1.10	0.29	0.31	0.32	0.32	0.34	0.36	0.35	0.35
USSR	0.97	0.85	0.85	0.24	0.19	0.21	0.21	0.23	0.16	0.18	0.18
Others	0.36	0.34	0.35	0.67	0.77	0.89	0.89	0.24	0.26	0.31	0.31
MAJOR OILSEEDS	147.07	145.62	149.45	1.40	1.44	1.43	1.43	205.82	209.64	214.29	214.31
United States	29.44	29.23	31.12	2.01	2.07	2.04	2.05	59.29	60.65	63.73	63.65
Total Foreign	117.63	116.39	118.33	1.25	1.28	1.27	1.27	146.53	148.99	150.56	150.66
COPRA	--	--	--	--	--	--	--	4.90	4.69	4.57	4.57
PALM KERNEL	--	--	--	--	--	--	--	3.33	3.28	3.59	3.59
TOTAL OILSEEDS	--	--	--	--	--	--	--	*214.05*	*217.61*	*222.45*	*222.47*
PALM OIL 2/	--	--	--	--	--	--	--	10.91	11.08	11.91	11.91

1/ U.S. rapeseed estimates by the WAOB and Interagency Oilseeds Committee. 2/ Not included in total oilseeds.

December 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 7

Cotton Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Nov.	Dec.	1989/90	1990/91	Nov.	Dec.
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	31.6	33.0	34.1	552	574	583	579	80.0	87.1	91.6	90.5
United States	3.9	4.7	5.4	688	711	727	727	12.2	15.5	18.2	18.0
Total Foreign	27.7	28.3	28.7	533	551	556	551	67.8	71.6	73.4	72.5
Maj. Foreign Exporters	13.1	13.2	13.5	727	791	776	775	43.7	48.1	48.3	48.2
Australia	0.2	0.3	0.3	1,271	1,604	1,532	1,340	1.4	2.0	1.9	1.7
Central America 1/	0.1	0.1	0.1	832	810	742	742	0.3	0.3	0.3	0.3
China	5.2	5.6	6.0	728	807	798	798	17.4	20.7	22.0	22.0
Egypt	0.4	0.4	0.4	683	719	811	811	1.3	1.4	1.3	1.3
Mexico	0.2	0.2	0.3	891	914	737	704	0.8	0.8	0.9	0.8
Pakistan	2.6	2.7	2.8	560	607	612	628	6.7	7.5	7.8	8.0
Sudan	0.3	0.2	0.2	456	422	494	494	0.6	0.4	0.4	0.4
Turkey	0.7	0.6	0.6	851	1,021	956	956	2.8	3.0	2.7	2.7
USSR	3.3	3.2	3.0	805	827	796	796	12.3	12.0	11.0	11.0
Major Importers 2/	0.4	0.4	0.3	887	803	861	855	1.5	1.5	1.4	1.4
Other Foreign	14.3	14.6	14.8	346	327	348	338	22.6	22.0	23.7	23.0
Argentina	0.6	0.6	0.7	486	468	501	486	1.3	1.4	1.5	1.5
Brazil	1.9	2.0	2.0	347	352	381	376	3.0	3.2	3.5	3.5
India	7.3	7.4	7.3	315	270	298	283	10.6	9.1	10.0	9.5
Syria	0.2	0.2	0.2	930	963	934	934	0.7	0.7	0.7	0.7
Others	4.3	4.5	4.7	357	367	370	368	7.0	7.6	8.1	7.9

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

December 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 8

The table below presents a 10-year record of the difference between the December projections and the final estimates. Using world wheat production as an example, changes between the December projection and the final estimate have averaged 4.7 million tons (0.9 percent) and ranged from -10.2 to 6.1 million tons. The December projection has been below the final 6 times and above the final 4 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 - 1990/91 1/					
	Difference		Lowest	Highest	Below	Above
	Average	Average	Difference		Final	Final
	Percent	---Million Metric Tons---			Number of Years 2/	
WHEAT						
World	0.9	4.7	-10.2	6.1	6	4
U.S.	0.5	0.3	-1.2	0.2	6	4
Foreign	1.1	4.7	-10.3	6.3	6	4
COARSE GRAINS 3/						
World	1.0	7.6	-19.8	6.9	5	5
U.S.	1.3	2.7	-7.5	2.1	8	2
Foreign	1.1	6.5	-15.4	7.6	4	6
RICE (Milled)						
World	2.2	6.7	-16.2	1.1	8	2
U.S.	2.6	0.1	-0.2	0.2	6	2
Foreign	2.2	6.7	-16.2	1.2	8	2
SOYBEANS						
World	2.3	2.1	-4.4	3.8	4	6
U.S.	2.6	1.4	-2.7	2.1	3	7
Foreign	3.9	1.6	-2.1	2.7	4	6
		---Million 480-lb. Bales---				
COTTON						
World	1.9	1.6	-6.3	2.2	3	6
U.S.	1.7	0.2	-0.5	0.4	5	4
Foreign	2.2	1.5	-6.7	1.8	3	6
UNITED STATES		-------Million Bushels-------				
CORN	1.4	93	-250	94	7	3
SORGHUM	2.4	19	-53	14	6	4
BARLEY	1.8	9	-12	24	6	4
OATS	1.3	6	-18	16	6	2

1/ The final estimate for 1981/82-1989/90 is defined as the first November estimate following the marketing year and for 1990/91 last month's estimate.
2/ May not total ten if projection was the same as the final.
3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

December 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

MAP 1

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

DECEMBER 11, 1991

1 - UNITED STATES

Record November snowfall covers Iowa and Minnesota, with unseasonably cold weather from the Rockies to the Appalachians. Snow precedes bitter cold air in the central Plains. Pacific storms bring some beneficial rain to California in early December, with milder weather and some record high temperatures returning to the Midwest and Southeast.

2 - SOUTH AMERICA

In Argentina, persistent wet weather has raised concerns about winter wheat quality and lodging. However, soil moisture is favorable for summer crops. Generally favorable rains fall across southern Brazil during November, aiding corn and soybeans.

3 - EUROPE

November rainfall favors winter grains entering dormancy, with spotty dryness in Germany, Romania and Spain. Recent moisture across the Mediterranean region benefits winter crops.

4 - WESTERN USSR

Mild November weather favors dormant winter grains. Recent bitter cold accompanies widespread snow.

5 - SOUTH AFRICA

A drying trend during November aids corn planting. December showers boost topsoil moisture in western corn areas that were becoming too dry.

6 - SOUTH ASIA

Showers in southern India boost irrigation for fall crops but cause some flooding in coastal rice areas.

7 - EASTERN ASIA

Continued dry weather is stressing winter wheat germination and causing poor establishment. While significant winter rains are unlikely, timely spring rains can still improve conditions. Southern China received needed rain to replenish reservoirs for next season's crops.

8 - SOUTHEAST ASIA

Beneficial showers reach Java's drought-stricken rice areas, improving planting prospects. Widespread showers in the Philippines help fall grain establishment.

9 - AUSTRALIA

Favorable harvest conditions exist for winter wheat throughout the country. Periodic showers during November have increased soil moisture levels for eastern summer crops.

10-NORTHWESTERN AFRICA

Below-normal November precipitation in Morocco and western Algeria helps wheat planting but limits early growth. Beneficial rain covers eastern Algeria and Tunisia.

(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 720-7917.)

WEATHER BRIEFS

NORTHWEST AFRICA: BECOMING TOO DRY IN MOROCCO

Unseasonably frequent and sometimes heavy rains fell across northwestern Africa's wheat growing areas during September and October 1991, boosting soil moisture levels and allowing an early winter grains planting around mid-October. Usually, winter grains are planted from November into December. Precipitation in Morocco was below normal during November 1991, causing some depletion of soil moisture and the need for subsequent rainfall for continued winter grain emergence and growth. Light rains during November 24 - December 7, 1991, dampened topsoils and provided some relief. Elsewhere, rainfall during November 1 - December 7, 1991 was frequent, but slightly below normal across Algeria and generally above normal across Tunisia. Soil moisture levels are similar to last year and, thus, sufficient for another good start for the winter grain crops in these two countries.

EASTERN MEDITERRANEAN: HEAVY RAINFALL EASES DROUGHT

Precipitation during the first 10 days of December 1991 was unseasonably widespread and heavy across the eastern Mediterranean countries. An unusual series of winter storms brought heavy precipitation to an area extending from northeast Africa in the south, across Greece and the Balkans in the northwest, to Iran in the east. Rainfall greatly improved soil moisture for winter grains across the Middle East and Turkey. Also, in Greece and Cyprus, run-off greatly increased reservoir levels, which were low due to multi-year droughts. Snowfall has been very heavy in the higher elevations and more northern areas, including Bulgaria, Romania, and Turkey. Flooding was widespread and caused damage to infrastructure in portions of Israel, Jordan, Turkey, and Iran.

SOUTH AFRICA: SOMEWHAT DRIER, BUT CONDITIONS STILL GOOD

Rainfall was slightly below normal across the Maize Triangle of South Africa during November 1991. However, conditions for summer crops remained favorable and much better than last year, due to adequate soil moisture caused by the above normal early season rainfall during October and early November 1991. Temperatures were above normal during November 24-30, 1991, increasing the need for moisture. However, rainfall returned during December 1-11, 1991. Rainfall continued to be frequent, but not excessive, across the eastern Cape Province and Natal. This benefited summer crops and sugarcane.

PRODUCTION BRIEFS

BRAZIL: 1992/93 COFFEE FORECAST DOWN SHARPLY

Brazil's 1992/93 coffee production is forecast at 22.0 million bags (60-kilogram), down 23 percent or 6.5 million bags from the revised 1991/92 outturn, according to the U.S. agricultural counselor in Brasilia. This initial forecast for the 1992/93 season is based on field travel by the office of the agricultural counselor in Brazil's major coffee producing areas during late October. Coffee producing areas were visited in the states of Parana, Sao Paulo, and Minas Gerais.

Most of the coffee trees in Parana and Sao Paulo were in their "off-year" production cycle during the 1991/92 season and neither state was able to produce more than 40 percent of its potential. With little credit and low grower incomes from the previous season, coffee growers were limited in the amount of inputs they could provide for the 1992/93 crop. Dry weather in July, August, and September 1991 left coffee trees in these 2 states in poor vegetative condition. Trees often had less than 20 percent of normal leaf coverage, with about three-fourths of the limbs dry at the time of the visit. The first significant bloom of trees in Parana and Sao Paulo occurred during early October. The trees had severe losses of newly-set coffee cherries because of dry weather and poor tree conditions. In both states, a significant number of coffee trees were uprooted to clear land for citrus, pasture, or sugarcane. Many trees were cut back to ground level or heavily pruned in an effort to boost vegetative vigor.

In the state of Minas Gerais (central, west, and southwest), the majority of trees were in their "on-year" production cycle during the 1991/92 season. The July/September weather was not as dry in this area as it was in the other two states. Low soil fertility and less-than-optimal plantation management are blamed for the current poor vegetative growth shown by the trees. Coffee plantations are located further north and at higher elevations than in Parana and Sao Paulo, causing coffee trees to bloom later in the season. Application of fertilizers and fungicides during the months of October and November are expected to produce beneficial results in terms of vegetative conditions of the coffee trees and improve yields.

In the state of Espirito Santo, coffee areas reportedly have had an adequate amount of rainfall during the past six months. The production potential for this state is near optimum.

TAIWAN: TRADE WITH CHINA COULD STIMULATE RICE PRODUCTION

Taiwan's rice production could be revitalized if the Government permits grain trade with China, according to the Taiwan Provincial Food Bureau. The Mainland Affairs Council recently decided to study the possibility of grain exchanges with China as part of the Government's efforts to improve relations. Taiwan's rice farmers are troubled by large stocks, declining domestic consumption, and difficulties in opening overseas markets. Taiwan could increase rice production by permitting planting on about 180,000 hectares of paddy fields taken out of production under a rice area diversion plan.

NORWAY: NEW POLICIES CHANGE GRAIN CORPORATION AND SUPPORT PRICES

Effective January 1, 1992, the Norwegian Grain Corporation will cease to be part of the Ministry of Agriculture and will become a separate state-owned company, the U.S. agricultural attache in Copenhagen reported. Other policy changes include a Government decision to reduce prices paid to farmers by 12 to 15 percent (depending on the grain), and redirect some support to individual farmers on an area basis, rather than price basis. This is the first time price supports were reduced in order to shift overall domestic support policies in the direction of area-based supports. The portion of the farmer's income originating from direct payments (based on area) rose appreciably and will have the effect of penalizing the larger, more efficient producers in favor of a social policy of keeping medium and small producers on the land. These policy changes have been motivated by the need to adjust agricultural support prices gradually in order to comply with General Agreement on Tariffs and Trade (GATT) standards expected from the current round of multilateral trade negotiations.

INDONESIA: RICE LAND OFFERED TO BUSINESS CONGLOMERATES

In an effort to expand rice production and enhance Indonesia's ability to remain self-sufficient in rice, the Government has offered business conglomerates land in North Sulawesi, South Sulawesi, Aceh, North Sumatra, and Lampung for rice production. These areas are comparatively less developed for rice production than Java and will require considerable investment, the U.S. agricultural attache in Jakarta reported. The expansion will be based on profit-sharing between these organizations and small-scale farmers. Planting for the 1992/93 rice season has started.

CANADA: STATISTICS CANADA ESTIMATES BUMPER GRAIN CROP

Total 1991/92 production of the 8 major grains in Canada is estimated at 61.2 million tons, down 3 percent from last year's record, according to Statistics Canada. Most of western Canada began the season with above normal precipitation that replenished soil moisture. These conditions promoted excellent crop growth, but plants developed shallow root systems. In low-lying areas, the excessive moisture resulted in a greater-than-normal incidence of disease, notably Sclerotinia and blackleg. Because of poor root development, hot, dry weather in many regions after mid-July stressed crops during the crucial grain-filling stage and reduced yields, especially for oats and barley. In eastern Canada, weather early in the season was hot and dry with precipitation below normal until mid-July. Yields varied widely in eastern Canada from good to poor, depending on the distribution and quantity of rainfall; however, corn and soybean yields were generally above expectations.

Wheat production is estimated at a record 32.8 million tons, marginally above last year's crop. Although winter wheat output fell by 0.7 million tons from 1990/91, additional spring wheat area more than compensated for the decline. Spring wheat production in Saskatchewan and Alberta increased, while output was lower in Manitoba. Total production of barley, corn, oats, rye, and mixed grains is estimated at 22.7 million tons, down 11 percent from 1990/91. Barley output fell 10 percent from last year to 12.5 million tons, mainly due to poorer yields resulting from dryness in Manitoba and Saskatchewan. Corn production rose to a record 7.3 million tons, 2 percent above last year as a result of increased area in Ontario. Higher yields in western Ontario offset lower yields in southern and eastern Ontario caused by dry conditions.

Total oilseed production reached a record 6.4 million tons, up 16 percent from 1990/91 and slightly above the previous record set in 1988/89. Rapeseed output is estimated at 4.3 million tons, up 31 percent from last season and marginally below the 1988/89 record crop. The major rapeseed producing provinces (Manitoba, Saskatchewan, and Alberta) increased area and yield from 1990/91. Soybean production climbed 9 percent from last year to a record 1.4 million tons. An increase in yield and a record harvested area boosted soybean output.

SOUTH AFRICA: CORN PLANTING OUTLOOK

Favorable rains in October and the first half of November encouraged farmers to plant more than a million hectares of corn, as of November 15, according to the U.S. agricultural attache in Pretoria. Rainfall diminished and temperatures increased to higher-than-normal levels during late November; however, recent rains should allow producers to successfully complete planting. Last year, farmers successfully harvested corn planted through late January. The USDA December estimate of corn harvested area stands at 3.25 million hectares.

CHILE: COLD WEATHER DAMAGES FRUITS AND VEGETABLES

According to the U.S. agricultural attache in Santiago, cold weather and snow in mid-October damaged approximately 16,000 hectares planted to fruit orchards, 6,500 hectares planted to vegetables, and 7,500 hectares of wine-grape vinyards. Orchard area damaged by type of fruit is as follows:

Fruit	Affected Area (Hectares)	Percent of Total Fruit Area
Table Grapes	6,500	14
Kiwifruit	3,500	28
Peaches/Nectarines	1,500	10
Plums	1,200	14
Pears	1,100	7
Apples	900	4
Asian Pears	300	20
Cherries	100	4

Additional information will be released as it becomes available.

SOUTH AMERICAN SOYBEAN PRODUCTION

South America is forecast to produce a 30.6 million ton 1991/92 soybean crop, up 8 percent from last year and up 72 percent since 1981/82. In spite of record production in Argentina and Bolivia, the 1990/91 soybean crop was the lowest since 1986/87 due to lower area and yields in Brazil and Paraguay. South American soybean production is second only to the United States and, in 1991/92, is forecast to account for 29 percent of the total world production.

BRAZIL

Brazil is the largest soybean producer in South America and is projected to harvest 17.5 million tons in 1991/92, up 13 percent from last year's drought-reduced crop. Area is forecast to make a minimal 3-percent recovery and yield is projected to return to a near average level. Soybean production fell to 15.5 million tons in 1990/91 from 20.3 million tons in 1989/90 due to a 15-percent loss in area and low yields in Brazil's southern growing areas. Brazil is the world's second largest producer and exporter of soybeans (behind the United States), the largest exporter of soybean meal, and the third largest exporter of soybean oil (behind the EC and Argentina).

Total area for 1991/92 is currently forecast at 10.0 million hectares. The Center-West area is expected to recover from last year's low level as farmers respond favorably to the Government's recent attempts to stimulate production in this region. Farmers in the south are not expected to increase soybean plantings over last year's low level; however, earlier expectations for large-scale diversions of soybean area to corn are not forecast to materialize. Despite pre-season dryness and topsoil moisture deficits in the primary growing areas, rainfall during the last week of September and the first week of October 1991 provided satisfactory conditions for planting and early crop establishment in most areas. Topsoil moisture is considered adequate in the Center-West. However, southern Mato Grosso do Sul, Parana, and Sao Paulo are experiencing shortages. Additional rainfall during December will be beneficial for crop establishment in all areas.

Brazilian soybean production has increased 40 percent in the last 10 years and nearly 500 percent since 1971. Recent increases are due largely to an expansion of area under cultivation in the Center-West growing region, which includes Mato Grosso, Mato Grosso do Sul, and Goias. Roughly 25 percent of the soybean crop is grown in the Center-West. The traditional growing region in the south, which consists of the states of Rio Grande do Sul, Parana, Santa Catarina, and Sao Paulo, is responsible for roughly 50 percent of Brazil's total production. Planting may begin as early as September and continue through January; however, the bulk of the soybean crop is planted from mid-October through December.

ARGENTINA

Argentina is South America's second largest soybean producer and the fourth largest producer in the world. Soybean production for 1991/92 is forecast at 10.7 million tons, down slightly from the record 10.8 million produced in 1990/91, despite an increase in harvested area of 5 percent from 1990/91. Argentina is one of the largest producers and exporters of oilseeds and oilseed products and will continue to be an important player in world soybean markets, both for soybeans and soybean products.

Soybean planting in Argentina begins in November and continues through January. Area for 1991 is forecast at a record 5.0 million hectares. Current growing conditions favor early planting due to adequate soil moisture. An estimated 92-percent of Argentine soybeans are produced in three provinces: Santa Fe, Buenos Aires, and Cordoba. Double-cropping soybeans after wheat is limited to the rich soil regions of northern Buenos Aires and southern Santa Fe and is expected to decrease from the estimated 35-percent of soybean area in 1990/91.

The large decrease in wheat area this year allows ample room for 1991/92 summer crop expansion. Soybeans, sunflower, and corn have excellent prospects for increased area. However, soybean seed quality might have been affected by last year's delayed harvest. If low quality seed is used to plant the 1991/92 crop, it could have an effect on yield since an estimated 30-50 percent of farmers retain their own seed for planting, despite having high-yielding commercial varieties available.

Improved economic conditions are contributing to renewed optimism among Argentine farmers. Recently, inflation has ranged between 1 and 2 percent for the months of August through October, down significantly from 96 percent in March 1990. This has made farm planning more realistic, especially for credit and input costs. In addition, the strong austral may induce farmers to increase input use as fertilizers and pesticides would be relatively less expensive.

PARAGUAY

Paraguay is the third largest soybean producer in South America, producing 5 percent of the South American soybean crop. Paraguay is forecast to produce 1.6 million tons of soybeans during the 1991/92 crop year, up 23 percent from last year's drought-reduced levels. Production has increased in recent years due to expanded area and changes in Paraguay's monetary and export policies to favor agricultural exports. Output has increased 167 percent since 1981/82 and 68 percent over the last five years.

Planted area is forecast at 0.9 million hectares, nearly unchanged from last year, but up 114 percent from 10 years ago. Soil moisture is adequate and planting of the 1991/92 crop is progressing normally. Planting begins in October and continues through December. The harvest season extends from April through June. Soybeans are grown primarily in southern Paraguay (east of the Paraguay River), where the climate, topography, and soil type are similar to the Brazilian soybean growing areas of western Parana and Rio Grande do Sul. Soybean area has more than doubled since 1981/82 and the potential for continued area expansion exists in the fertile, forested areas of southeastern Paraguay.

Paraguayan farmers currently face an unfavorable economic situation, following two consecutive poor harvests. In spite of achieving record planted soybean area in 1989/90, production was limited by hot, dry weather at flowering, which greatly reduced yields. In 1990/91, dry weather reduced yields once again and a shortage of affordable credit at planting led to low input use and planting delays. The 1991/92 outlook is for a minimal increase in planted area. Farmers lack capital and do not expect Government assistance. However, there are no attractive alternatives to soybeans, so diversion of cropping area to other crops is not expected. Preplanting soil moisture was low, but adequate rainfall arrived in time for planting to progress normally. If yields reach normal levels, Paraguayan soybean production should increase significantly over last year.

BOLIVIA

Bolivia is South America's fourth largest soybean producer, but accounts for only 1 percent of total South American production. Soybean production has been growing rapidly over the last 7 years and is expected to increase in the near future, albeit at a slower pace. Production for 1991/92 is forecast at 430,000 tons, up 10 percent from last year's record of 390,000.

Soybeans are the principle oilseed grown in Bolivia and nearly all soybeans are grown in the Santa Cruz region, east of the Andes. The tropical wet and dry climate allows for two soybean crops. The summer, or main, crop accounts for 80 to 85 percent of production. Planting begins in November/December and harvesting in April/May. The smaller winter soybean crop has a growing season starting in May and June, with harvesting from September through October. Area for 1991 is forecast at 210,000 hectares.

Economic incentives favor continued expansion of soybean production in Bolivia. Soybeans are a non-traditional agricultural product and are aided by international development loans designed to expand exports. Subsidized transportation and a 10-percent rebate for exports of non-traditional products effectively support and encourage soybean production. The availability of suitable land, especially along the Santa Cruz to Corumba railway, also encourages expansion. The limiting factor is working capital.

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TABLE 9

South American Soybean
Area, Yield, and Production

	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991f
AREA HARVESTED (1000 hectares)											
Brazil	8,202	8,136	9,421	10,153	9,450	9,270	10,524	12,170	11,400	9,650	10,000
Argentina	1,986	2,281	2,910	3,270	3,316	3,510	4,260	4,000	4,950	4,750	5,000
Paraguay	420	350	420	550	550	530	615	850	980	890	900
Bolivia	49	33	50	63	66	69	83	144	173	195	210
Other 1/	99	90	66	95	133	160	164	212	222	218	198
Total	10,756	10,890	12,867	14,131	13,515	13,539	15,646	17,376	17,725	15,703	16,308
YIELD (metric tons per hectare)											
Brazil	1.565	1.813	1.65	1.8	1.492	1.866	1.712	1.906	1.784	1.606	1.75
Argentina	2.09	1.841	2.405	2.064	2.201	1.994	2.277	1.625	2.172	2.274	2.15
Paraguay	1.429	1.486	1.31	1.727	1.091	1.792	1.789	1.9	1.607	1.461	1.778
Bolivia	1.755	1.576	1.56	1.571	2.227	1.594	1.699	2.042	1.329	2	2.048
Other	1.697	1.9	1.712	1.832	1.947	1.881	1.732	1.627	1.689	1.711	1.828
Total	1.659	1.808	1.809	1.858	1.658	1.895	1.869	1.839	1.877	1.806	1.879
PRODUCTION (1000 metric tons)											
Brazil	12,835	14,750	15,541	18,278	14,100	17,300	18,021	23,200	20,340	15,500	17,500
Argentina	4,150	4,200	7,000	6,750	7,300	7,000	9,700	6,500	10,750	10,800	10,750
Paraguay	600	520	550	950	600	950	1,100	1,615	1,575	1,300	1,600
Bolivia	86	52	78	99	147	110	141	294	230	390	430
Other	168	171	113	174	259	301	284	345	375	373	362
Total	17,839	19,693	23,282	26,251	22,406	25,661	29,246	31,954	33,270	28,363	30,642

1/ includes Chile, Colombia, Ecuador, Peru, Uruguay, and Venezuela

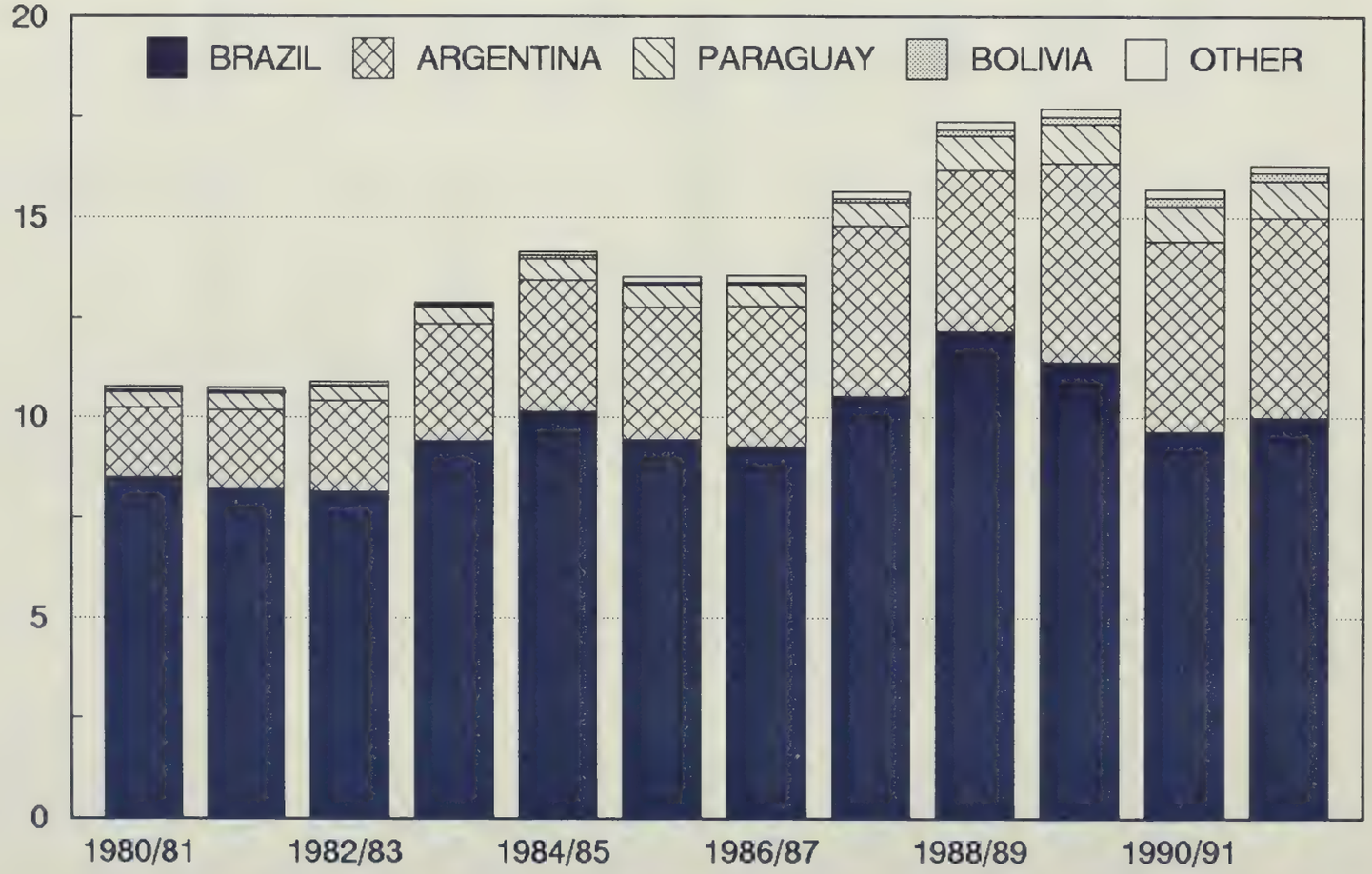
Note: Date refers to the first year of marketing year; e.g., 1991 =1991/92.

DECEMBER 1991

Production Estimates and Crop Assessment Division, FAS, USDA

CHART 1

South American Soybeans
1992 Harvested Area (million hectares)



December 1991

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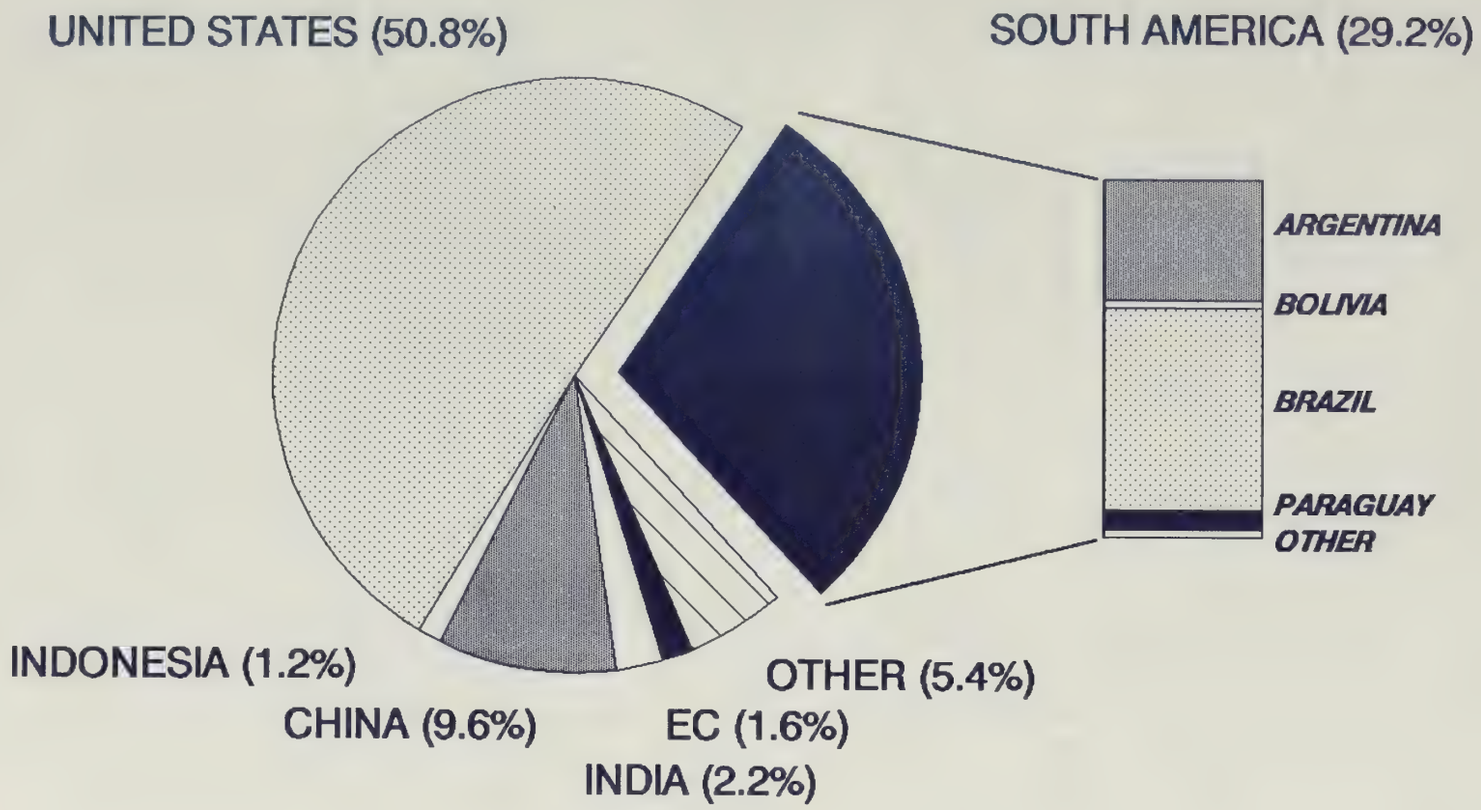
CHART 2

South American Soybean Production

Percent of World Production



December 1991

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SUNFLOWERSEED PRODUCTION IN THE SOVIET UNION

The Soviet Union is the world's largest producer of sunflowerseed, contributing about 30 percent of the total world crop. Unusually hot and dry weather in a significant portion of the Soviet sunflower-growing region depressed 1991 yields; however, 1991 production is still expected to reach 6.0 million tons. Despite its role as the world's top sunflowerseed producer, the Soviet Union continues to import about 10 percent of its domestic consumption of sunflower oil. Increased oilseed production has been set as one of the goals of Soviet agriculture.

The sunflower appeared in Russia during the sixteenth century, following its introduction to Europe from North America. Sunflowers were grown mostly for decoration or as a garden crop until 1829, when Russian farmers began to recognize their value as an oilseed crop. Sunflower cultivation then became widespread and the selection of high-oil-yielding varieties began. Sunflowerseed is currently the primary source of vegetable oil in the Soviet Union and sunflowerseed meal is a major source of high-protein livestock feed. Sunflowers are grown also for silage and green chop.

Sunflowers are grown primarily in the fertile black-soil regions of the Ukraine, Moldova, and the Russian Republic (RSFSR). The republics of Kazakhstan and Georgia are relatively minor producers. Sunflowers are grown in approximately the same areas that produce corn for grain, although the sunflower region extends farther east, into the lower Volga Valley. Soviet agricultural officials indicate that sunflower area has been "shifting" southward; less sunflowerseed is being planted in the lower-yielding northern areas and more is being sown in the southern regions.

After a slump in plantings beginning in 1979, Soviet sunflowerseed area has rebounded over the past six years. The greatest increase has taken place in the RSFSR where sunflowerseed area has risen almost 30 percent since 1986. Area also has increased steadily in the Ukraine as well as the minor-producing republics of Georgia and Kazakhstan.

Sunflowerseed yields in the Soviet Union vary significantly depending upon where the crop is grown. According to official Soviet statistics, yields are highest in Moldova. During the last three years, sunflowerseed yields in that republic averaged 27 percent higher than yields in the Ukraine and 67 percent higher than yields in the RSFSR. Yields in the minor-producing areas are lower and more erratic than yields in other republics. Although Soviet sunflowerseed yields do not match the high levels achieved in other European countries, they are comparable to yields obtained in the other major-producing countries. From 1981 through 1990, USSR yields averaged 1.33 tons per hectare, compared to 1.36 in Argentina (the world's second largest sunflowerseed producer) and 1.29 in the United States.

Proper crop rotation plays a major role in effective disease control in sunflower fields, particularly in light of recent cutbacks in the availability of plant protection agents in the Soviet Union. Soviet agronomic experts recommend that sunflowers not be planted in the same field more than once every 8-10 years in order to prevent contamination by rust, downy mildew, and other pathogens. Yields were reduced during the late 1970's when Soviet producers were planting sunflowers every 3-5 years. Fields were given a chance to recover as sunflowerseed area declined between 1978 and 1986, due in part to the increased planting of rapeseed in portions of the northern regions of the sunflowerseed area. Yields climbed steadily between 1986 and 1989, due to a combination of good weather and improved farming practices (intensive technology). During 1990, the western North Caucasus region experienced dry weather in June and heavy rains during harvest; this pulled the USSR yield down by 11 percent. Throughout much of the 1991 growing season, the sunflower crop in the northern North Caucasus region and the lower Volga Valley suffered from drought and sunflowerseed yields fell for the second year in a row.

As a result of depressed yields for the past two years, sunflowerseed production declined in both 1990 and 1991. Most of the decrease occurred in the RSFSR, which experienced the majority of the weather-related crop stress.

SUNFLOWERSEED PRODUCTION IN THE USSR BY REPUBLIC

Year	USSR	RSFSR	Ukraine	Moldova	Kazakhstan	Georgia
	(1,000 Metric Tons)					
1985	5,254	2,621	2,288	244	93	9
1986	5,266	2,363	2,561	253	83	6
1987	6,071	3,030	2,710	209	117	5
1988	6,164	2,958	2,775	270	139	17
1989	7,070	3,789	2,885	282	105	3
1990	6,500	3,400	2,700	300	100	8

Source: USSR State Statistical Committee (GOSKOMSTAT).

Sunflowerseed meal is a major source of high-protein feed. The Soviet Union has recognized the need to achieve significant increases in dairy, poultry, and livestock production and any improvement in the performance of the dairy and livestock sector will greatly depend upon increasing not only the supply but also the quality of feed. Faced with growing demand for high-protein feed ingredients, Soviet agricultural officials have stated that it will be necessary to boost total oilseed production from about 12 million tons to 22 million. Any effort to increase production, however, would be hampered by numerous constraints, such as inadequate storage facilities, decreased deliveries of fertilizers and plant-protection agents, and shortages of machinery, fuel, spare parts, and manpower. Obsolete oilseed-crushing facilities and vegetable-oil refineries pose an even more serious problem. Many processing plants are 40-50 years old and some were even built at the turn of the century. The Soviet government has been relatively unsuccessful in attracting the help of western investors in updating oilseed-processing plants.

The central government's efforts to ensure deliveries of sunflowerseed to the All-Union Fund has encountered difficulties. State procurements have fallen since 1989 as producers have elected to keep more of their crop on the farm for feed or turn to alternative markets, such as bartering for building materials and other scarce commodities. State procurements of sunflowerseed fell short of government quotas in 1990, with only 4.6 million tons sold to the state. In the 5 years previous to 1990, when state quotas were being met, producers delivered about 80 percent of the total sunflowerseed production to the State. Last year this ratio dropped to 70 percent as growers held back their crop. Final 1991 sunflowerseed procurements have not been announced. Officials have recognized that oilseed procurement prices are too low and announced a plan in January 1991 to raise prices. However, no nationwide increase has yet gone into effect. Actual price increases have been implemented only in the Ukraine.

SUNFLOWERSEED PRODUCTION AND PROCUREMENT

	Production (Million Tons)	Procurement (Million Tons)	Percentage Procured
1985	5.3	4.2	79
1986	5.3	4.3	81
1987	6.1	4.8	79
1988	6.2	4.9	79
1989	7.1	5.6	79
1990	6.6	4.6	70

Source: USSR State Statistical Committee (GOSKOMSTAT).

The sunflowerseed situation in the Soviet Union is similar to that of corn-for-grain production. Demand from the livestock and poultry sectors remains high for domestically-produced corn and sunflowerseed, and officials have expressed the desire to increase the production of both crops. However, while climatic conditions would permit an expansion in sown area and some of the agronomic problems faced by producers (e.g., supplies of fertilizers and pesticides) could be overcome without extreme difficulty, major problems in post-harvest processing are likely to impede significant increased production.

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CHART 3

USSR SUNFLOWERSEED AREA AND PRODUCTION

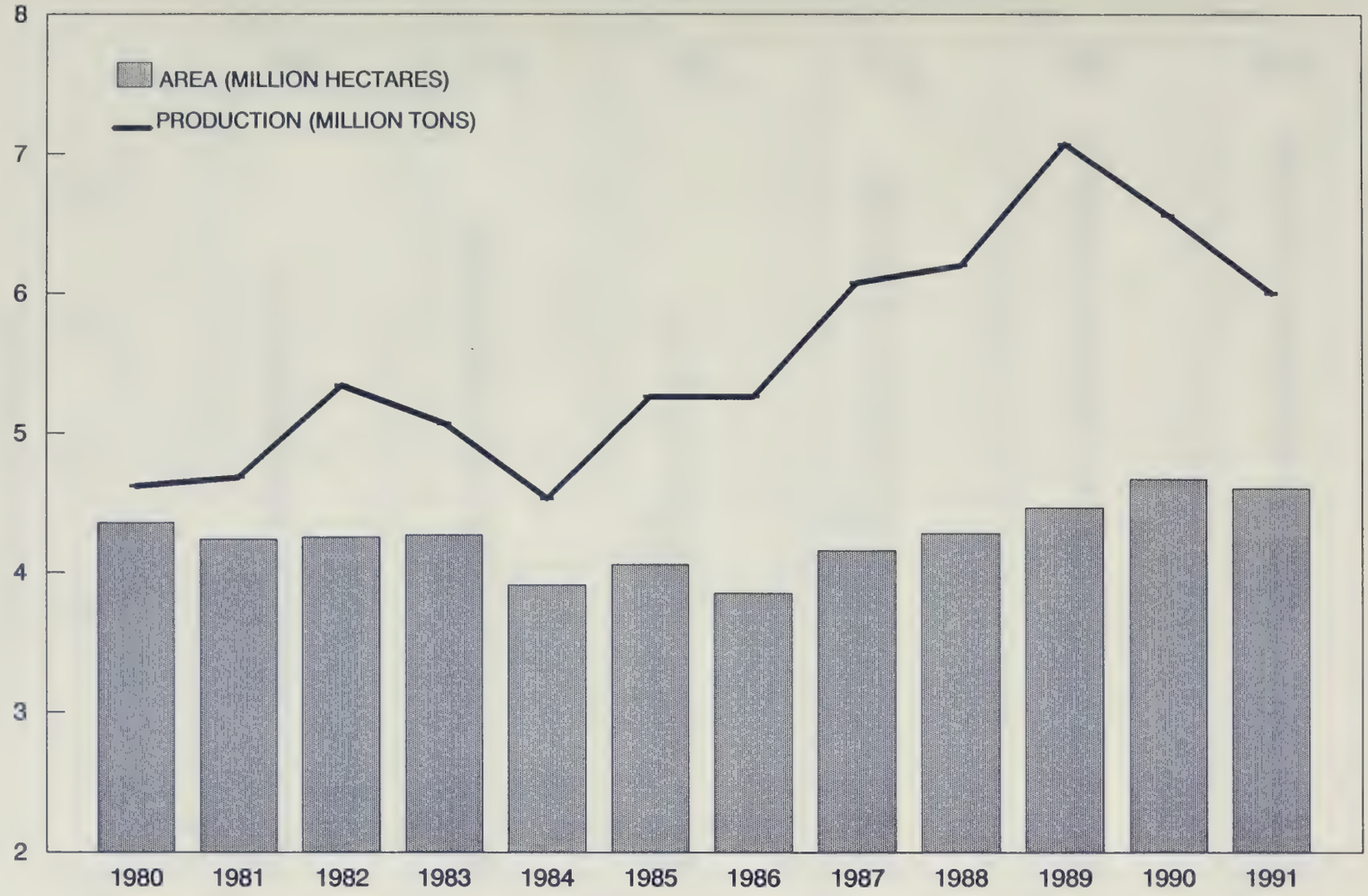


CHART 4

USSR SUNFLOWERSEED AREA BY REPUBLIC

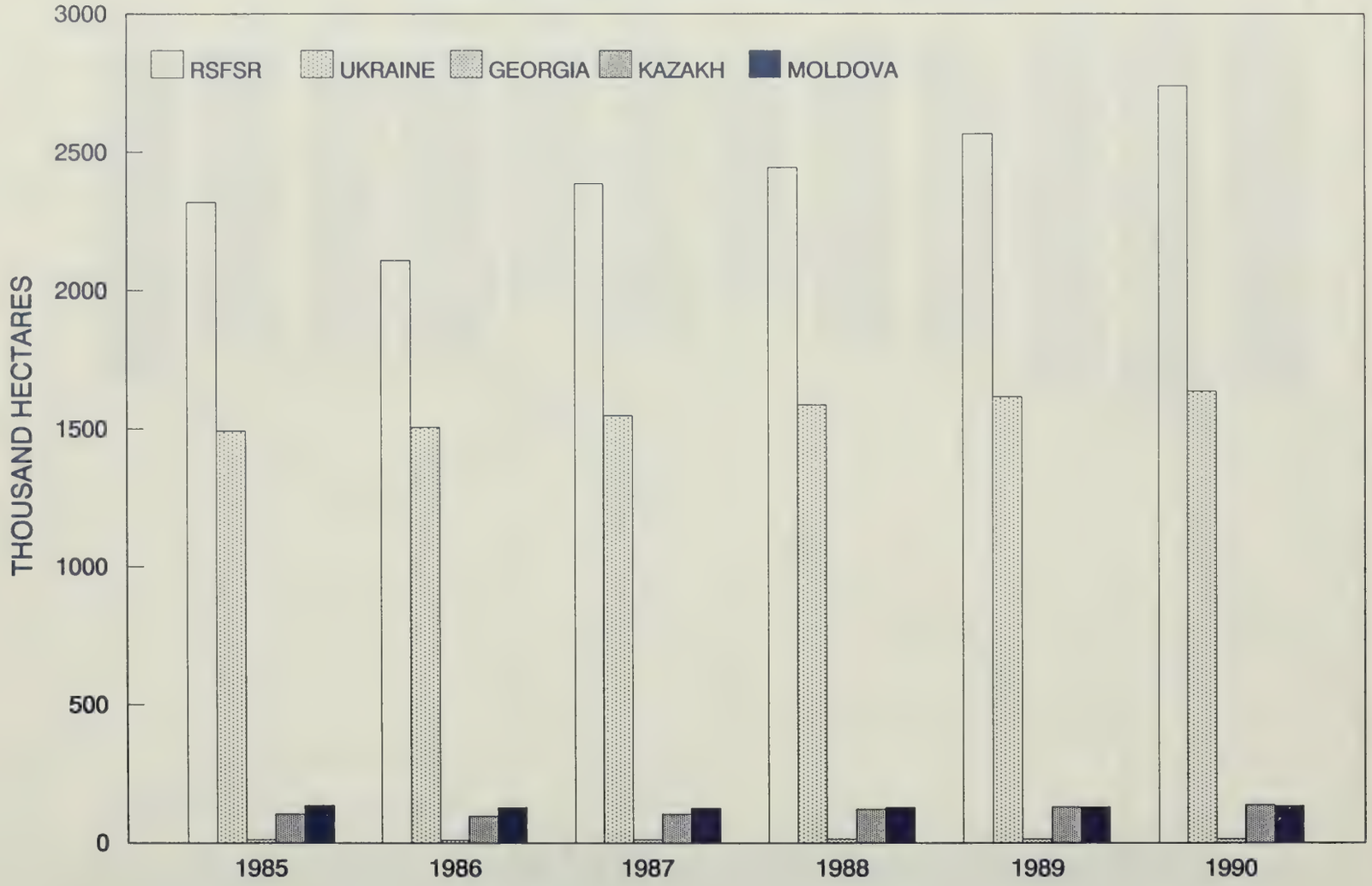
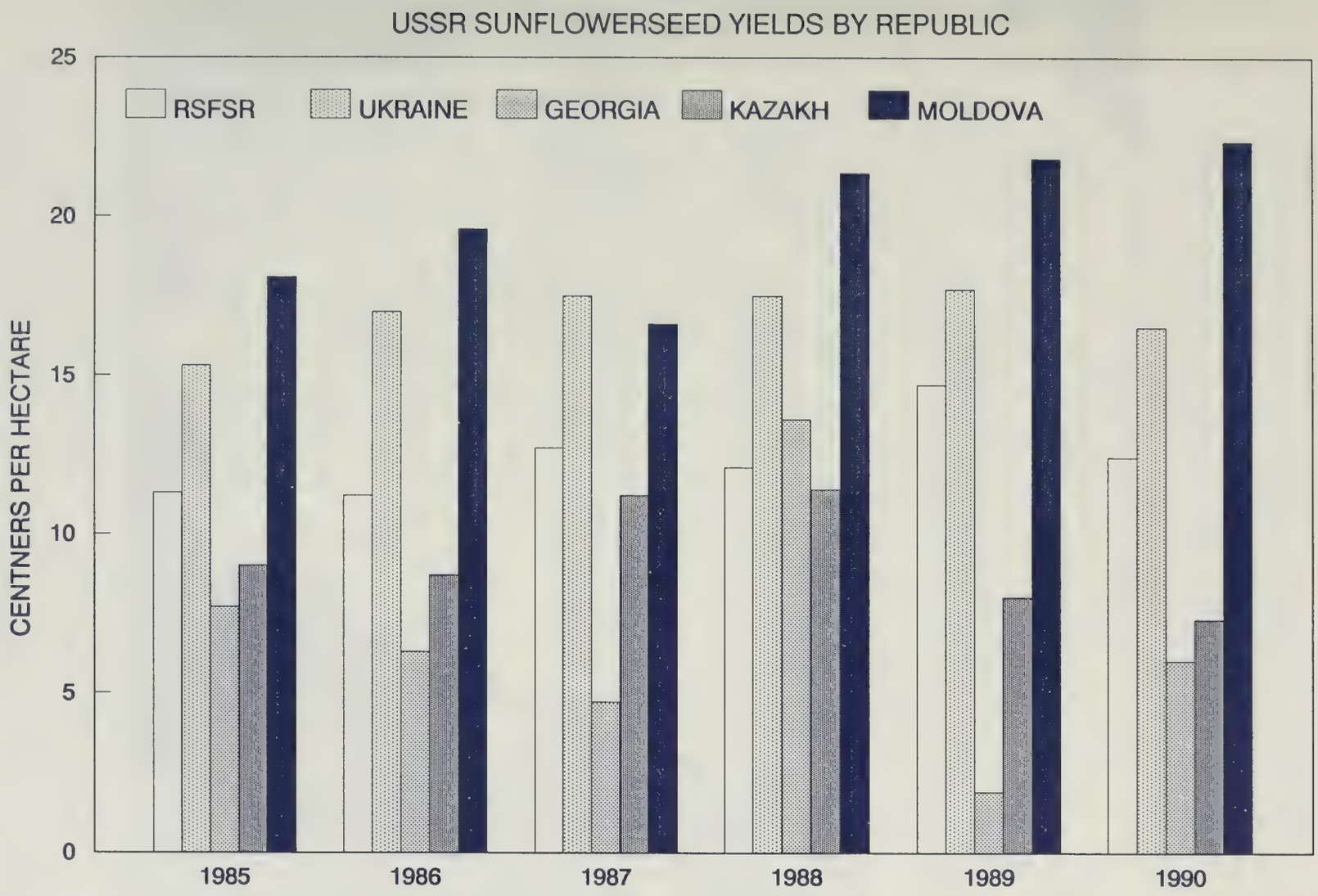


CHART 5


USSR SUNFLOWERSEED YIELDS BY REPUBLIC
RSFSR
UKRAINE
GEORGIA
KAZAKH
MOLDOVA
CENTNERS PER HECTARE
25
20
15
10
5
0
1985
1986
1987
1988
1989
1990

MAP 2

EAST SIBERIA
NORTHERN
WEST SIBERIA
NORTHWEST
RIGA
BALTIC
MINSK
BELORUSSIA
MOSCOW
CENTRAL
V. VYATKA
URAL
104
102
70
KIEV
UKRAINE
C. D. E
1027
376
VOLGA
183
738
KAZAKHSTAN
128
441
VOLGOGRAD
SEA OF AZOV
973
N. CAUCASUS
BLACK SEA
ARAL SEA
CENTRAL ASIA
CASPIAN SEA
11
TBILISI
CAUCASUS
Western USSR
1987 SUNFLOWERSEED AREA
BY ECONOMIC REGION (ThHa)

WORLD UNMANUFACTURED TOBACCO PRODUCTION

World tobacco production for 1991 is projected at 7.0 million tons (farm sales weight), down slightly from the June estimate and the 7.1 million 1990 production level. Production increases are projected in Zimbabwe, Argentina, Canada, Mexico, and Malawi because of more favorable weather and increased prices, and in Greece and Spain because of increased plantings and favorable weather. Declines are projected in India, Turkey, Italy, and Japan because of production controls, Brazil because of drought, and China because of reduced plantings and unfavorable weather.

Total unmanufactured tobacco production in North America for 1991 is down slightly. Production is forecast above the June estimate in Canada and Mexico. United States production is forecast at nearly 731,000 tons, slightly below the June estimate. Mexican production for 1991 is estimated at 35,000 tons, above the June projection of 33,000 and 1,000 over the 1990 production, due to significantly higher yields. During 1991, many of the tobacco farmers in Nayarit, the major tobacco growing region, planted alternate crops because they could not get production contracts with tobacco buyers. These producers lost money in 1991 on beans, watermelons, and other crops, while farmers who planted tobacco made good returns. Mexican producer associations and cigarette companies have successfully negotiated tobacco prices for the 1992 tobacco harvest and plantings are expected to be up almost 100 percent. Canadian tobacco production for 1991 is up 11 percent from June projections and 7 percent from 1990 due to increased plantings because of strong export demand for flue-cured tobacco, which accounts for almost all Canadian production.

Tobacco production in Brazil for 1991 is forecast at 419,000 tons, down 13,000 from June and 16,000 below 1990, due to lower yields in the southern states because of continued drought. The tobacco industry is helping farmers build curing barns in order to encourage them to expand plantings for the 1992 crop. Total tobacco production in Argentina for 1991 is 94,000 tons, slightly above the June forecast but 40 percent above the 1990 level of 68,000 tons. Another sharp rise in plantings is expected in 1992.

EC tobacco production for 1991 is forecast at 487,000 tons, 13 percent above the the June projection of 430,000 tons and 11 percent over the 1990 level. The 1991 output was well above the proposed EC quota of 340,000 tons. Tobacco production has been expanding because of reduced price support for other crops. Production in Greece is estimated at a record 177,650 tons, up almost 50 percent from the June estimate of 120,000. Increased plantings and excellent weather caused huge increases in the flue-cured and burley tobacco crop. Spanish tobacco production is expected to be 53,000 tons, up 20 percent from the June estimate due to favorable weather and slightly higher plantings. In Italy, 1991 tobacco production declined 7,000 tons to 213,000 compared to the June projection, slightly below the 1990 record of 215,000 tons.

South Africa's 1991 tobacco crop is estimated at 34,000 tons, down from the June projection of 39,000 due to smaller than expected flue-cured yields in the Groblersdal irrigation area, but up 5,000 from 1990. In Zimbabwe, the 1991 production is estimated at 178,000 tons, 8,000 above the June projection and 34,000 above 1990, a 24-percent increase. The national average 1991 price for flue-cured, the most important type, was Z$11.68/kg compared to Z$6.50/kg last year. These very high prices are expected to encourage increased plantings for 1992. In Malawi, 1991 production is estimated at 125,000 tons, 15 percent above the June estimate and 23 percent over 1990.

Chinese tobacco production for 1991 is expected to be 2,480 million tons, down 6 percent from 1990 due to smaller plantings and unfavorable weather. For 1992, production is expected to increase because of slightly higher plantings and more normal yields. The high level of tobacco production in the past few years has been due to pressure from local Governments to increase output which has been taxed as a major source of revenue. For 1992, the central government will take full control of tobacco tax income. This change should permit farmers to stabilize tobacco production at profitable levels and produce more non-tobacco crops.

Indian tobacco production for 1991 is estimated at 480,000 tons, down from the 510,000 forecast in June and the 560,000 produced in 1990. Production is down due to a 45,000 ton reduction in dark-air and sun-cured tobacco due to the lack of rain, while flue-cured and burley production were up. For 1992, production is projected to expand due to increased plantings of flue-cured and burley and better export prospects because of a 20 percent devaluation of the Ruppe. Japanese tobacco production for 1991 is estimated at 71,000 tons, 5 percent below the June estimate and 9,000 below 1990. The reduction is because of abnormally cold weather and excess moisture. Flue-cured tobacco was reduced because of the ash fallout from the Mount Unzen volcano. Thailand's tobacco crop for 1991 is estimated at 75,000 tons, down slightly from the June forecast, and 1990 production. Production of flue-cured and burley tobacco was above the June forecast while oriental output was down. In 1992, production is expected to expand because of strong export demand.

South Korean tobacco production for 1991 is estimated at 69,000 tons, down 2,000 from the June estimate but still 3,000 above 1990. Production is expected to remain at this level in 1992. The Philippine 1991 tobacco crop is estimated at 79,000 tons, up slightly from the June forecast and 9,000 above 1990. In 1992, production is forecast to expand provided the burley and flue-cured seedbed losses caused by Typhoon Ruth can be replaced.

Turkey is expected to produce 243,000 tons of tobacco in 1991, up slightly from the June projection, but down 19 percent from the 1990 crop of 298,000 tons. However, the 1991 crop, based on dry weight, is down 13 percent from June and 29 percent from 1990 due to losses from blue mold that were encouraged by wet weather in July. Farmers are expected to reduce plantings in 1992 because of tighter grading standards.

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TABLE 10

TOTAL UNMANUFACTURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	AREA 1989	AREA 1990	AREA 1991 (FORECAST)	PRODUCTION 1989	PRODUCTION 1990	PRODUCTION 1991 (FORECAST)
	HECTARES			METRIC TONS		
NORTH AMERICA						
Canada	31,140	29,408	30,340	75,573	63,105	67,740
Mexico	33,029	22,118	17,739	59,890	34,653	35,430
United States	274,681	296,643	309,470	620,152	737,162	730,537
REGION TOTAL	338,850	348,169	357,549	755,615	834,920	833,707
SOUTH AMERICA						
Argentina	55,248	50,155	64,610	80,544	67,624	94,443
Bolivia	1,250	1,250	1,250	1,250	1,250	1,250
Brazil	294,000	282,000	291,000	462,000	435,000	419,000
Chile	3,423	3,909	4,394	11,105	12,785	14,283
Colombia	19,007	19,604	19,879	29,348	31,580	32,478
Ecuador	1,800	1,800	1,800	3,850	3,850	3,850
Paraguay	2,740	3,040	3,065	3,545	4,045	8,050
Peru	2,500	2,500	2,500	3,100	3,100	3,100
Uruguay	800	800	800	1,400	1,400	1,400
Venezuela	7,917	8,012	8,152	13,490	13,597	12,423
REGION TOTAL	388,685	373,070	397,450	609,632	574,231	590,277
CENTRAL AMERICA						
Costa Rica	851	888	760	1,567	1,728	1,313
El Salvador	544	543	561	970	970	1,038
Guatemala	6,440	6,244	6,105	11,866	10,568	10,086
Honduras	2,531	2,640	2,753	4,246	4,605	4,614
Nicaragua	2,240	2,240	2,240	4,550	4,550	4,550
Panama	720	720	720	1,302	1,302	1,302
REGION TOTAL	13,326	13,275	13,139	24,501	23,723	22,903
CARIBBEAN						
Cuba	50,000	50,000	50,000	41,606	44,000	44,000
Dominican Rep.	27,011	14,830	18,450	28,069	15,085	25,312
Jamaica & Dep	1,175	1,175	1,175	2,339	2,339	2,339
REGION TOTAL	78,186	66,005	69,625	72,014	61,424	71,651
NORTH AFRICA						
Algeria	2,600	2,700	2,700	4,800	5,000	5,000
Libya	900	900	900	1,450	1,450	1,450
Morocco	5,483	5,788	6,325	6,551	7,171	7,953
Tunisia	4,950	6,000	6,000	5,610	6,215	6,300
REGION TOTAL	13,933	15,388	15,925	18,411	19,836	20,703
OTHER AFRICA						
Angola	3,950	3,950	3,950	3,900	3,900	3,900
Burundi	2,000	2,000	2,000	1,600	1,600	1,600
Cameroon	3,400	3,400	3,400	5,500	5,500	5,500
Congo	4,000	4,000	4,000	1,800	1,800	1,800
Cote D' Ivoire	10,000	10,000	10,000	2,490	2,490	2,490
Ethiopia	3,000	3,000	3,000	3,450	3,500	3,500
Ghana	3,950	3,950	3,950	1,433	1,839	2,080
Kenya	10,335	8,805	8,805	11,510	9,910	9,910
Madagascar	5,900	5,900	5,900	5,500	5,500	5,500
Malawi	89,640	100,110	117,100	86,615	101,652	125,360
Mozambique	2,700	2,700	2,700	2,900	2,900	2,900
Nigeria	7,700	7,300	7,300	9,223	9,223	9,223
South Africa	24,539	24,841	24,175	38,949	29,106	33,851
Tanzania	21,250	21,250	21,250	15,055	14,055	14,055
Togo	4,000	4,000	4,000	2,000	2,000	2,000
Uganda	3,500	4,300	4,300	3,200	4,000	4,000
Zaire	3,700	3,700	3,700	4,110	4,110	4,110
Zambia	3,500	3,500	3,500	4,300	4,300	4,300
Zimbabwe	60,544	62,924	71,720	135,205	139,803	177,957
REGION TOTAL	267,608	279,630	304,750	338,740	347,188	414,036

December 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 10 (Continued)

TOTAL UNMANUFACTURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA--- 1989	1990	1991 (FORECAST)	---PRODUCTION--- 1989	1990	1991 (FORECAST)
	HECTARES			METRIC TONS		
OTHER ASIA						
Bangladesh	40,500	40,500	40,500	40,000	40,000	40,000
Burma	55,000	55,000	55,000	45,000	45,000	45,000
Cambodia	9,000	9,000	9,000	5,000	5,000	5,000
China	1,798,000	1,592,600	1,565,000	2,830,000	2,627,500	2,482,500
India	377,000	421,100	389,192	492,800	564,400	479,500
Indonesia	227,529	236,390	246,250	146,914	154,480	159,120
Japan	30,661	29,964	29,408	74,397	80,542	70,900
Korea, North	37,000	37,000	37,000	46,000	46,000	46,000
Korea, South	30,985	31,339	30,671	78,422	66,213	69,441
Laos	4,000	4,000	4,000	3,000	3,000	3,000
Malaysia	12,481	10,488	15,400	13,877	10,997	11,000
Pakistan	43,216	40,911	44,375	71,086	68,044	75,904
Philippines	50,150	49,830	52,831	73,305	70,130	78,832
Sri Lanka	12,165	12,165	12,165	9,000	9,000	9,000
Taiwan	8,019	7,941	7,755	18,986	19,131	18,800
Thailand	56,716	63,665	61,820	64,780	76,235	75,428
Vietnam	32,000	32,000	32,000	28,000	28,000	28,000
REGION TOTAL	2,824,422	2,673,893	2,632,367	4,040,567	3,913,672	3,697,425
MIDDLE EAST						
Iran	18,000	18,000	18,000	25,000	25,000	25,000
Iraq	2,000	2,000	2,000	2,180	2,180	2,180
Jordan	2,931	2,953	2,953	2,827	2,800	2,800
Lebanon	3,750	3,750	3,750	5,000	5,000	5,000
Oman	1,800	1,800	1,800	2,000	2,000	2,000
Syria	10,145	12,757	15,650	10,859	13,007	17,013
Turkey	284,542	309,244	260,850	269,517	298,152	242,624
United Arab Em.	350	350	350	2,000	2,000	2,000
Yemen	3,300	3,300	3,300	5,720	5,720	5,720
REGION TOTAL	326,818	354,154	308,653	325,103	355,859	304,337
EUROPEAN COMMUNITY						
Belgium-Lux.	438	461	500	1,800	1,553	300
France	11,413	10,704	10,700	29,216	28,295	26,573
Germany	6,955	5,880	5,001	12,464	11,147	10,500
Greece	81,471	76,459	82,700	115,750	134,368	177,650
Italy	95,165	85,121	84,000	197,316	214,643	213,000
Portugal	2,076	2,257	2,450	5,472	5,573	6,048
Spain	27,330	23,450	24,050	45,415	43,500	52,705
REGION TOTAL	224,848	204,332	209,401	407,433	439,079	486,776
Switzerland	675	671	660	1,620	1,265	1,350
EAST EUROPE						
Albania	24,000	24,000	24,000	15,000	15,000	15,000
Bulgaria	72,661	52,891	61,100	75,537	66,858	82,400
Czechoslovakia	3,750	3,750	3,750	5,500	5,000	5,500
Hungary	9,082	8,700	10,000	12,869	14,346	18,816
Poland	29,430	25,754	28,720	56,060	50,000	54,780
Romania	34,400	16,845	9,500	27,500	14,200	10,257
Yugoslavia	49,000	45,000	50,000	63,270	46,620	62,271
REGION TOTAL	222,323	176,940	187,070	255,736	212,024	249,024
USSR	113,400	110,000	107,600	239,000	257,000	257,000
OCEANIA						
Australia	4,771	4,727	4,700	13,296	13,327	13,500
New Zealand	600	600	600	1,550	1,550	1,550
REGION TOTAL	5,371	5,327	5,300	14,846	14,877	15,050
OTHER 1/	7,502	7,282	7,062	6,781	6,635	6,464
WORLD	4,825,947	4,628,136	4,616,551	7,109,999	7,061,733	6,970,703

1/ Includes Guyana, Haiti, St. Vincent, Chad, Trin & Tobag, Cent. Afr. Rep. Liberia, Mali, Mauritius, Niger, Benin, Reunion, Sierra Leone, Swaziland, Cyprus, Israel, Austria, and Solomon Is.

December 1991 Production Estimates and Crop Assessment Division, FAS USDA

WORLD UNMANUFACTURED TOBACCO PRODUCTION BY TYPE

World unmanufactured tobacco production for 1991 is estimated at 7.0 million tons, farm sales weight basis, down slightly from the June estimate and down 1 percent from 1990. Estimated production by leaf type is as follows:

Leaf Type	Revised 1989	Revised 1990	Preliminary June 1991	Preliminary December 1991
	1,000 metric tons			
Flue-cured	4,099	4,003	4,028	4,006
Burley	712	730	819	807
Oriental	807	825	752	813
Dark air/sun-cured	1,154	1,159	1,174	984
Light air-cured	90	75	77	78
Dark air-cured, cigar	204	212	208	217
Dark fire-cured	43	58	59	66
Total	7,110	7,062	7,119	6,971

NOTE: Numbers may not add due to rounding.

FLUE-CURED

Production of flue-cured tobacco for 1991 is estimated at 4.0 million tons, up slightly from 1990 but below 1989. Since the June report, world production has declined slightly due to a 60,000 ton reduction in Chinese production. Flue-cured production for 1991 has been revised upward since June in Canada, Mexico, Malawi, Italy, and Zimbabwe due largely to higher yields. In Greece, production is double the June estimate because of increased plantings. Flue-cured production for 1991 compared to June is down in Japan, the Philippines, and Brazil because of weather problems.

BURLEY

Production of burley tobacco for 1991 is forecast at 807,000 tons, down from the June projection, but above the 730,000 estimated for 1990. The decline since June is due to a reduction in Chinese and Italian production of 20,000 and 9,000 tons, respectively, because of lower than projected plantings. Estimates were increased by 4,000 tons each for Greece and Malawi because plantings were above June projections.

ORIENTAL

Production of oriental tobacco is estimated at 813,000 tons, up 8 percent from the June estimate, but 1 percent below 1990 production. Output in Turkey, the largest producer, was revised upward for both 1990 and 1991 by 6 and 20 percent, respectively, because of increased area and yields, compared to June projections. However, large losses are projected for 1991 because of blue mold in unmanufactured tobacco stocks. Turkey's farm sales weight production of oriental tobacco is down 19 percent from last year at 241,000 tons, while dry weight production is down 30 percent to 174,000 tons. In Greece, increased yields raised the oriental production to 122,000 tons, 36 percent above the June estimate.

DARK-AIR/SUN-CURED

Production of dark-air/sun-cured tobacco is estimated at 1.0 million tons, down 16 percent from the June estimate of 1.2 million and 15 percent below 1990. The declines are due to lower production in three of the major production areas -- China, India, and Italy. In China, both area and yields were down from June projections, while in India only yields were reduced. In Italy, plantings were revised down for both 1990 and 1991.

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TABLE 11

FLUE-CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	AREA 1989	AREA 1990	AREA 1991 (FORECAST)	PRODUCTION 1989	PRODUCTION 1990	PRODUCTION 1991 (FORECAST)
	HECTARES			METRIC TONS		
NORTH AMERICA						
Canada	30,640	28,948	30,000	74,456	62,150	67,000
Mexico	7,012	7,160	3,590	14,410	11,380	7,470
United States	158,242	168,785	164,737	366,665	426,034	391,903
REGION TOTAL	195,894	204,893	198,327	455,531	499,564	466,373
SOUTH AMERICA						
Argentina	31,600	29,500	32,480	48,325	43,645	58,520
Brazil	167,000	157,000	165,000	310,000	295,000	278,000
Chile	1,102	1,186	1,340	3,071	3,521	3,830
Colombia	2,944	2,971	2,810	5,117	5,222	5,185
Ecuador	650	650	650	1,575	1,575	1,575
Peru	1,200	1,200	1,200	1,820	1,820	1,820
Uruguay	665	665	665	1,250	1,250	1,250
Venezuela	4,997	5,097	5,362	8,350	8,512	8,000
REGION TOTAL	210,158	198,269	209,507	379,508	360,545	358,180
CENTRAL AMERICA						
Costa Rica	265	250	252	489	539	481
El Salvador	377	377	366	621	621	670
Guatemala	838	763	713	1,357	1,419	1,182
Honduras	561	694	909	954	1,366	1,453
Nicaragua	500	500	500	1,000	1,000	1,000
Panama	100	100	100	180	180	180
REGION TOTAL	2,641	2,684	2,840	4,601	5,125	4,966
CARIBBEAN						
Dominican Rep.	1,413	1,590	1,660	2,796	3,176	3,312
Jamaica and Dep	547	547	547	1,212	1,212	1,212
REGION TOTAL	1,960	2,137	2,207	4,008	4,388	4,524
Morocco	34	47	45	79	102	103
OTHER AFRICA						
Angola	3,200	3,200	3,200	3,200	3,200	3,200
Ethiopia	1,500	1,500	1,500	1,725	1,750	1,750
Ghana	2,805	3,160	3,230	1,024	1,464	1,700
Kenya	7,600	5,500	5,500	8,492	5,920	5,920
Madagascar	750	750	750	1,200	1,200	1,200
Malawi	16,500	16,600	17,500	19,835	21,818	25,750
Mozambique	1,270	1,270	1,270	1,350	1,350	1,350
Nigeria	1,500	1,100	1,100	1,752	1,752	1,752
South Africa	20,460	20,465	20,500	34,050	24,760	29,885
Tanzania	18,218	18,218	18,218	13,000	11,000	11,000
Uganda	1,350	2,150	2,150	1,200	2,000	2,000
Zaire	880	880	880	1,400	1,400	1,400
Zambia	2,850	2,850	2,850	3,500	3,500	3,500
Zimbabwe	57,660	59,425	67,000	129,960	133,866	170,000
REGION TOTAL	136,543	137,068	145,648	221,688	214,980	260,407

December 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 11 (Continued)

FLUE-CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	AREA 1989	AREA 1990	AREA 1991 (FORECAST)	PRODUCTION 1989	PRODUCTION 1990	PRODUCTION 1991 (FORECAST)
	HECTARES			METRIC TONS		
OTHER ASIA						
Bangladesh	12,000	12,000	12,000	13,000	13,000	13,000
Burma	5,800	5,800	5,800	13,200	13,200	13,200
Cambodia	2,600	2,600	2,600	1,200	1,200	1,200
China	1,503,000	1,342,000	1,333,000	2,405,000	2,259,000	2,200,000
India	105,470	88,600	103,342	116,210	100,840	109,500
Indonesia	64,000	75,500	79,000	42,300	49,980	52,450
Japan	19,752	19,660	19,595	46,556	50,540	45,300
Korea, North	15,100	15,100	15,100	18,400	18,400	18,400
Korea, South	22,329	22,595	21,390	54,020	46,037	46,511
Laos	1,150	1,150	1,150	1,025	1,025	1,025
Malaysia	12,311	10,168	15,000	13,637	10,517	10,400
Pakistan	10,971	11,516	14,000	23,790	24,988	29,400
Philippines	29,000	29,300	29,600	40,684	41,610	42,900
Sri Lanka	6,117	6,117	6,117	4,909	4,909	4,909
Taiwan	8,019	7,941	7,755	18,986	19,131	18,800
Thailand	23,373	24,775	26,000	29,684	32,500	33,500
Vietnam	12,000	12,000	12,000	9,800	9,800	9,800
REGION TOTAL	1,852,992	1,686,822	1,703,449	2,852,401	2,696,677	2,650,295
MIDDLE EAST						
Iran	2,750	2,750	2,750	5,300	5,300	5,300
Jordan	2,931	2,953	2,953	2,827	2,800	2,800
Syria	1,769	1,158	1,900	3,501	2,828	3,800
Turkey	821	750	750	1,812	2,000	1,500
Yemen	3,300	3,300	3,300	5,720	5,720	5,720
REGION TOTAL	11,571	10,911	11,653	19,160	18,648	19,120
EUROPEAN COMMUNITY						
France	2,650	2,601	2,800	5,425	5,152	5,485
Germany	1,861	1,707	2,300	2,507	2,397	3,900
Greece	3,597	7,600	15,500	9,400	29,600	45,500
Italy	21,850	23,633	24,000	36,685	54,023	55,000
Portugal	1,612	1,838	2,000	4,022	4,350	4,733
Spain	10,500	13,700	13,800	21,300	27,000	35,365
REGION TOTAL	42,070	51,079	60,400	79,339	122,522	149,983
EAST EUROPE						
Bulgaria	9,000	7,200	7,500	8,200	10,200	12,000
Czechoslovakia	3,000	3,000	3,000	4,400	4,000	4,400
Hungary	5,100	5,150	5,400	6,956	8,484	10,160
Poland	13,532	11,206	13,000	23,611	20,170	23,000
Romania	6,900	3,370	2,375	5,175	2,680	3,955
Yugoslavia	12,000	16,000	16,000	17,205	17,760	20,646
REGION TOTAL	49,532	45,926	47,275	65,547	63,294	74,161
OCEANIA						
Australia	4,771	4,727	4,700	13,296	13,327	13,500
New Zealand	583	583	583	1,520	1,520	1,520
REGION TOTAL	5,354	5,310	5,283	14,816	14,847	15,020
OTHER 1/	2,983	2,983	2,983	2,394	2,394	2,394
WORLD	2,511,732	2,348,129	2,389,617	4,099,072	4,003,086	4,005,526

1/ Includes Guyana, Haiti, Trinidad & Tobago, Benin, Mali, Mauritius, Reunion, Mali, Sierra Leone, and Cyprus.

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TABLE 12

BURLEY TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	AREA 1989	AREA 1990	AREA 1991 (FORECAST)	PRODUCTION 1989	PRODUCTION 1990	PRODUCTION 1991 (FORECAST)
	HECTARES			METRIC TONS		
NORTH AMERICA						
Mexico	13,584	10,917	10,225	26,180	18,013	21,360
United States	98,967	109,555	125,304	218,891	270,488	297,250
REGION TOTAL	112,551	120,472	135,529	245,071	288,501	318,610
SOUTH AMERICA						
Argentina	13,100	13,200	23,010	20,190	17,450	28,830
Brazil	37,000	35,000	34,000	59,000	57,000	53,000
Chile	2,154	2,531	2,890	7,629	8,639	10,050
Colombia	1,978	2,481	2,569	2,877	3,870	4,038
Ecuador	700	700	700	1,700	1,700	1,700
Paraguay	40	65	65	45	50	50
Peru	400	400	400	380	380	380
Uruguay	65	65	65	50	50	50
Venezuela	2,920	2,915	2,790	5,140	5,085	4,423
REGION TOTAL	58,357	57,357	66,489	97,011	94,224	102,521
CENTRAL AMERICA						
Costa Rica	148	150	119	266	236	189
El Salvador	167	166	195	349	349	368
Guatemala	5,278	5,191	5,039	10,086	8,824	8,480
Honduras	1,300	1,217	1,050	1,729	1,572	1,450
Nicaragua	1,150	1,150	1,150	2,300	2,300	2,300
Panama	380	380	380	1,000	1,000	1,000
REGION TOTAL	8,423	8,254	7,933	15,730	14,281	13,787
DOMINICAN REP.	962	1,075	1,090	1,641	2,091	2,400
NORTH AFRICA						
Libya	360	360	360	859	859	859
Morocco	5,323	5,640	6,200	6,030	6,667	7,500
Tunisia	4,950	6,000	6,000	5,610	6,215	6,300
REGION TOTAL	10,633	12,000	12,560	12,499	13,741	14,659
OTHER AFRICA						
Angola	250	250	250	200	200	200
Kenya	235	250	250	288	278	278
Madagascar	2,150	2,150	2,150	1,545	1,545	1,545
Malawi	52,000	53,000	60,000	61,212	64,019	75,000
Mozambique	950	950	950	1,150	1,150	1,150
South Africa	285	109	125	174	113	116
Swaziland	100	100	100	100	100	100
Tanzania	200	200	200	55	55	55
Zaire	650	650	650	660	660	660
Zambia	650	650	650	800	800	800
Zimbabwe	2,684	3,267	4,375	5,207	5,893	7,893
REGION TOTAL	60,154	61,576	69,700	71,391	74,813	87,797

December 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 12 (Continued)

BURLEY TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	AREA 1989	AREA 1990	AREA 1991 (FORECAST)	PRODUCTION 1989	PRODUCTION 1990	PRODUCTION 1991 (FORECAST)
	HECTARES			METRIC TONS		
OTHER ASIA						
Bangladesh	350	350	350	280	280	280
China	60,000	25,000	30,000	75,000	40,000	40,000
India	2,865	8,300	12,200	2,560	8,200	12,000
Indonesia	35	40	50	44	50	70
Japan	9,040	8,560	8,395	23,695	25,785	22,500
Korea, South	8,656	8,744	9,281	24,402	20,176	22,930
Malaysia	170	320	400	240	480	600
Pakistan	270	322	300	530	600	570
Philippines	9,000	8,500	9,200	19,300	17,260	22,500
Sri Lanka	843	843	843	1,347	1,347	1,347
Thailand	6,843	8,200	9,420	16,765	20,500	24,300
REGION TOTAL	98,072	69,179	80,439	164,163	134,678	147,097
MIDDLE EAST						
Syria	1,579	1,471	1,800	3,105	3,492	3,600
Turkey	52	60	60	116	120	100
REGION TOTAL	1,631	1,531	1,860	3,221	3,612	3,700
EUROPEAN COMMUNITY						
France	1,190	1,395	1,500	3,098	3,780	3,789
Germany	3,130	2,614	1,151	5,926	5,230	2,650
Greece	1,732	1,800	3,200	4,600	4,268	10,150
Italy	12,960	16,244	18,000	39,134	54,682	61,000
Portugal	464	419	450	1,450	1,223	1,315
Spain	16,000	9,200	9,700	23,200	15,600	16,460
REGION TOTAL	35,476	31,672	34,001	77,408	84,783	95,364
Switzerland	675	671	660	1,620	1,265	1,350
EAST EUROPE						
Bulgaria	3,500	3,400	3,600	4,100	4,200	5,400
Czechoslovakia	750	750	750	1,100	1,000	1,100
Hungary	130	120	150	199	200	257
Poland	2,347	2,984	3,400	3,098	4,030	4,590
Romania	8,600	4,200	1,900	8,170	4,175	2,109
Yugoslavia	3,000	2,000	3,000	4,995	3,330	4,995
REGION TOTAL	18,327	13,454	12,800	21,662	16,935	18,451
New Zealand	17	17	17	30	30	30
OTHER 1/	736	636	726	845	868	857
WORLD	406,014	377,894	423,804	712,292	729,822	806,623

1/ Includes Haiti, Austria and Ghana.

December 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 13

ORIENTAL TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	AREA 1989	AREA 1990	AREA 1991 (FORECAST)	PRODUCTION 1989	PRODUCTION 1990	PRODUCTION 1991 (FORECAST)
	HECTARES			METRIC TONS		
NORTH, SOUTH & CENT. AMERICA						
Mexico	0	310	160	0	210	140
Chile	100	90	85	161	148	123
Costa Rica	421	430	355	790	882	606
Guatemala	143	76	143	166	81	152
Honduras	22	33	14	22	27	12
Panama	40	40	40	9	9	9
REGION TOTAL	726	979	797	1148	1357	1042
Libya	240	240	240	58	58	58
OTHER AFRICA						
Ethiopia	1,500	1,500	1,500	1,725	1,750	1,750
Malawi	600	450	1,100	296	180	510
South Africa	1,015	964	1,000	575	533	525
Zimbabwe	200	232	345	38	44	64
REGION TOTAL	3,315	3,146	3,945	2,634	2,507	2,849
OTHER ASIA						
China	3,100	5,000	6,000	6,200	6,500	7,500
Pakistan	11,321	10,493	11,000	21,000	18,360	19,800
Philippines	150	30	31	146	30	32
Thailand	8,500	14,330	10,600	8,791	15,055	9,728
REGION TOTAL	23,071	29,853	27,631	36,137	39,945	37,060
MIDDLE EAST						
Cyprus	17	17	17	11	11	11
Iran	10,470	10,470	10,470	12,500	12,500	12,500
Iraq	2,000	2,000	2,000	2,180	2,180	2,180
Israel	400	200	0	280	120	0
Lebanon	3,750	3,750	3,750	5,000	5,000	5,000
Syria	6,552	9,883	11,450	4,146	6,430	9,113
Turkey	283,626	308,394	260,000	267,563	296,008	241,000
REGION TOTAL	306,815	334,714	287,687	291,680	322,249	269,804
EUROPEAN COMMUNITY						
Greece	76,142	67,059	64,000	101,750	100,500	122,000
Italy	13,374	10,823	11,000	21,848	19,021	20,000
REGION TOTAL	89,516	77,882	75,000	123,598	119,521	142,000
EAST EUROPE						
Bulgaria	60,161	42,291	50,000	63,237	52,458	65,000
Romania	10,300	5,040	1,900	8,140	4,185	1,793
Yugoslavia	34,000	27,000	31,000	41,070	25,530	36,630
REGION TOTAL	104,461	74,331	82,900	112,447	82,173	103,423
USSR	113,400	110,000	107,600	239,000	257,000	257,000
WORLD	641,544	631,145	585,800	806,702	824,810	813,236

DECEMBER 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 14

DARK AIR/SUN-CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	AREA 1989	AREA 1990	AREA 1991 (FORECAST)	PRODUCTION 1989	PRODUCTION 1990	PRODUCTION 1991 (FORECAST)
	HECTARES			METRIC TONS		
NORTH AMERICA						
Canada	446	410	300	1,014	855	650
United States	1,434	1,409	1,810	2,963	3,469	4,114
REGION TOTAL	1,880	1,819	2,110	3,977	4,324	4,764
SOUTH AMERICA						
Argentina	9,800	6,800	8,350	10,950	5,640	6,340
Bolivia	1,250	1,250	1,250	1,250	1,250	1,250
Brazil	76,000	76,000	76,000	71,000	62,000	67,000
Chile	67	102	79	244	477	280
Colombia	12,662	12,742	13,170	19,226	20,330	21,235
Ecuador	325	325	325	450	450	450
Paraguay	2,700	2,975	3,000	3,500	3,995	8,000
Peru	800	800	800	800	800	800
REGION TOTAL	103,604	100,994	102,974	107,420	94,942	105,355
Dominican Rep.	24,636	12,165	15,700	23,632	9,818	19,600
NORTH AFRICA						
Algeria	2,600	2,700	2,700	4,800	5,000	5,000
Libya	300	300	300	533	533	533
Morocco	126	101	80	442	402	350
REGION TOTAL	3,026	3,101	3,080	5,775	5,935	5,883
OTHER AFRICA						
Angola	500	500	500	500	500	500
Burundi	2,000	2,000	2,000	1,600	1,600	1,600
Congo	2,200	2,200	2,200	750	750	750
Cote D' Ivoire	10,000	10,000	10,000	2,490	2,490	2,490
Madagascar	1,000	1,000	1,000	1,300	1,300	1,300
Malawi	2,640	4,660	5,500	372	1,635	2,100
Mali	333	333	333	183	183	183
Mozambique	400	400	400	230	230	230
Nigeria	1,200	1,200	1,200	1,070	1,070	1,070
South Africa	2,479	2,865	2,200	3,700	3,450	3,040
Swaziland	100	100	100	100	100	100
Togo	2,000	2,000	2,000	1,000	1,000	1,000
Zaire	450	450	450	532	532	532
REGION TOTAL	25,302	27,708	27,883	13,827	14,840	14,895

December 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 14 (Continued)

DARK AIR/SUN-CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA--- 1989	1990	1991 (FORECAST)	---PRODUCTION--- 1989	1990	1991 (FORECAST)
	----------HECTARES----------			----------METRIC TONS----------		
OTHER ASIA						
Bangladesh	21,515	21,515	21,515	19,685	19,685	19,685
Burma	49,200	49,200	49,200	31,800	31,800	31,800
Cambodia	6,400	6,400	6,400	3,800	3,800	3,800
China	199,900	150,000	125,000	270,800	237,000	150,000
India	262,165	321,400	270,100	363,530	451,360	352,500
Indonesia	149,894	147,100	153,200	84,170	83,850	85,800
Korea, North	15,100	15,100	15,100	18,400	18,400	18,400
Laos	2,850	2,850	2,850	1,975	1,975	1,975
Pakistan	19,143	17,316	17,500	21,006	19,966	21,000
Sri Lanka	1,726	1,726	1,726	1,654	1,654	1,654
Vietnam	20,000	20,000	20,000	18,200	18,200	18,200
REGION TOTAL	747,893	752,607	682,591	835,020	887,690	704,814
MIDDLE EAST						
Iran	4,780	4,780	4,780	7,200	7,200	7,200
Oman	1,800	1,800	1,800	2,000	2,000	2,000
United Arab Em.	350	350	350	2,000	2,000	2,000
REGION TOTAL	6,930	6,930	6,930	11,200	11,200	11,200
EUROPEAN COMMUNITY						
France	7,573	6,708	6,400	20,693	19,363	17,299
Germany	658	280	280	1130	470	470
Italy	41,654	28,841	25,000	91,536	75,640	65,000
REGION TOTAL	49,885	35,829	31,680	113,359	95,473	82,769
EAST EUROPE						
Albania	24,000	24,000	24,000	15,000	15,000	15,000
Poland	9,305	7,870	8,300	18,431	15,930	16,600
Romania	8,600	4,235	3,325	6,015	3,160	2,400
REGION TOTAL	41,905	36,105	35,625	39,446	34,090	34,000
OTHERS 1/	981	786	731	799	765	769
WORLD	1,006,042	978,044	909,304	1,154,455	1,159,077	984,049

1/ Includes Solomon Is., Uruguay, Panama, Haiti, Ghana, St. Vincent and Benin.

December 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 15

LIGHT AIR-CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	AREA 1989	AREA 1990	AREA 1991 (FORECAST)	PRODUCTION 1989	PRODUCTION 1990	PRODUCTION 1991 (FORECAST)
	HECTARES			METRIC TONS		
NORTH AMERICA						
Mexico	7,585	2,931	2,060	13,770	4,090	3,630
United States	4,577	4,332	4,534	6,941	7,400	8,056
REGION TOTAL	12,162	7,263	6,594	20,711	11,490	11,686
SOUTH AMERICA						
Argentina	700	620	738	1,047	855	733
Brazil	8,000	8,000	10,000	13,000	13,000	14,000
Colombia	1,008	1,023	850	1,527	1,558	1,300
Peru	100	100	100	100	100	100
REGION TOTAL	9,808	9,743	11,688	15,674	15,513	16,133
CENTRAL AMERICA						
Guatemala	181	214	210	257	244	272
Honduras	108	126	200	163	181	226
Nicaragua	140	140	140	300	300	300
REGION TOTAL	429	480	550	720	725	798
OTHER AFRICA						
Cameroon	810	810	810	600	600	600
Congo	1,800	1,800	1,800	1,050	1,050	1,050
Madagascar	2,000	2,000	2,000	1,455	1,455	1,455
Niger	1,000	1,000	1,000	930	930	930
Nigeria	5,000	5,000	5,000	6,401	6,401	6,401
Reunion	100	100	100	100	100	100
South Africa	300	438	350	450	250	285
Zaire	370	370	370	532	532	532
REGION TOTAL	11,380	11,518	11,430	11,518	11,318	11,353
OTHER ASIA						
Bangladesh	6,135	6,135	6,135	6,580	6,580	6,580
India	6,500	2,800	3,550	10,500	4,000	5,500
Japan	1,869	1,744	1,418	4,146	4,217	3,100
Korea	6,800	6,800	6,800	9,200	9,200	9,200
Pakistan	1,511	1,264	1,575	4,760	4,130	5,134
Sri Lanka	3,479	3,479	3,479	1,090	1,090	1,090
REGION TOTAL	26,294	22,222	22,957	36,276	29,217	30,604
MIDDLE EAST						
Syria	245	245	500	107	257	500
EUROPEAN COMMUNITY						
Germany	1,306	1,279	1,270	2,901	3,050	3,480
Italy	1,635	1,623	2,000	2,248	3,234	3,500
REGION TOTAL	2,941	2,902	3,270	5,149	6,284	6,980
WORLD	63,259	54,373	56,989	90,155	74,804	78,054

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TABLE 16

DARK AIR-CURED TOBACCO, CIGAR
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	HECTARES			METRIC TONS		
NORTH AMERICA						
Canada	54	50	40	103	100	90
Mexico	3,623	0	1,004	4,400	0	1,880
United States	5,350	6,311	6,611	11,573	13,905	14,496
REGION TOTAL	9,027	6,361	7,655	16,076	14,005	16,466
SOUTH AMERICA						
Brazil	6,000	6,000	6,000	9,000	8,000	7,000
Colombia	415	387	480	601	600	720
Ecuador	125	125	125	125	125	125
REGION TOTAL	6,540	6,512	6,605	9,726	8,725	7,845
CENTRAL AMERICA						
Honduras	540	570	580	1,378	1,459	1,473
Nicaragua	450	450	450	950	950	950
Panama	180	180	180	95	95	95
REGION TOTAL	1,170	1,200	1,210	2,423	2,504	2,518
CARIBBEAN						
Cuba	50,000	50,000	50,000	41,606	44,000	44,000
Jamaica and Dep	628	628	628	1,127	1,127	1,127
REGION TOTAL	50,628	50,628	50,628	42,733	45,127	45,127
OTHER AFRICA						
Cameroon	2,590	2,590	2,590	4,900	4,900	4,900
Cent. Afr. Rep.	750	750	750	650	650	650
Uganda	2,150	2,150	2,150	2,000	2,000	2,000
REGION TOTAL	5,490	5,490	5,490	7,550	7,550	7,550
OTHER ASIA						
Bangladesh	500	500	500	455	455	455
China	32,000	70,600	71,000	73,000	85,000	85,000
Indonesia	13,600	13,750	14,000	20,400	20,600	20,800
Philippines	12,000	12,000	14,000	13,175	11,230	13,400
Thailand	18,000	16,360	15,800	9,540	8,180	7,900
REGION TOTAL	76,100	113,210	115,300	116,570	125,465	127,555
EUROPEAN COMMUNITY						
Belgium-Lux	438	461	500	1,800	1,553	300
Spain	830	550	550	915	900	880
REGION TOTAL	1,268	1,011	1,050	2,715	2,453	1,180
EAST EUROPE						
Hungary	3,852	3,430	4,450	5,714	5,662	8,399
Poland	133	46	20	201	70	30
REGION TOTAL	3,985	3,476	4,470	5,915	5,732	8,429
OTHER 1/	295	333	309	290	337	303
WORLD	154,503	188,221	192,717	203,998	211,898	216,973

1/ Includes Costa Rica, St. Vincent, Chad and Turkey.

December 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 17

DARK FIRE-CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	AREA 1989	AREA 1990	AREA 1991 (FORECAST)	PRODUCTION 1989	PRODUCTION 1990	PRODUCTION 1991 (FORECAST)
	HECTARES			METRIC TONS		
NORTH AMERICA						
Mexico	1,225	800	700	1,130	960	950
United States	6,111	6,251	6,474	13,119	15,866	14,718
REGION TOTAL	7,336	7,051	7,174	14,249	16,826	15,668
SOUTH AMERICA						
Argentina	48	35	32	32	34	20
OTHER AFRICA						
Benin	66	66	66	133	133	133
Ghana	395	315	190	148	139	100
Kenya	2,500	3,055	3,055	2,730	3,712	3,712
Liberia	10	10	10	10	10	10
Malawi	17,900	25,400	33,000	4,900	14,000	22,000
Mali	333	333	333	183	183	183
Mozambique	80	80	80	170	170	170
Sierra Leone	198	198	198	200	200	200
Tanzania	2,832	2,832	2,832	2,000	3,000	3,000
Togo	2,000	2,000	2,000	1,000	1,000	1,000
Zaire	1,350	1,350	1,350	986	986	986
REGION TOTAL	27,664	35,639	43,114	12,460	23,533	31,494
EUROPEAN COMMUNITY						
Italy	3,692	3,957	4,000	5,865	8,043	8,500
EAST EUROPE						
Poland	4,113	3,648	4,000	10,719	9,800	10,560
WORLD	42,853	50,330	58,320	43,325	58,236	66,242

December 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TOBACCO PRODUCTION PROSPECTS FOR 1992 IN SELECTED COUNTRIES

Tobacco production forecasts for 1992 in selected countries are up 320,000 tons, 7 percent above their 1991 production levels. Forecasts are up in Argentina, Brazil, China, India, Japan, Malawi, Mexico, the Philippines, South Africa, Spain, Thailand, and Zimbabwe. Production is projected to decline in Turkey, with no changes forecast in Canada and South Korea. In China, the world's largest producer, production for 1992 is projected up 3 percent following a 1991 crop that was down 6 percent from 1990, due to reduced plantings and weather-reduced yields. Production in India and Brazil is projected to be up 9 and 21 percent, respectively, while output in Turkey may decline 8 percent.

SOUTHERN HEMISPHERE

Southern Hemisphere tobacco production for 1992 is forecast to increase over 1991 as projected plantings are up in all countries. Argentine production is projected at 130,350 tons, a new record, up 38 percent from 1991 after a 40-percent increase in 1990. Prices for the 1992 crop are projected 5-10 percent above last year. Production has been expanding because of strong export demand and sharply reduced government regulations. In Brazil, plantings of the 1992 crop are up 7 percent, but drought conditions in the south will limit expansion of flue-cured and burley tobacco.

Malawi is expected to produce over 130,000 tons of tobacco in 1992, a 4-percent increase over the 1991 production of 125,000 tons. Farm prices, up 20 percent over the 1991 level, caused increased plantings and the application of more yield-increasing inputs. Weather conditions this year are not as favorable as last year and, as a consequence, yields are expected to be down for flue-cured and burley, the major export types. In Zimbabwe, 1992 tobacco production is projected up 13 percent to 201,060 tons due to increased plantings encouraged by very favorable prices for the 1991 crop.

NORTHERN HEMISPHERE

Production prospects in the Northern Hemisphere, where the bulk of the plantings for the 1992 crop is still months away, are mixed. In Canada, the 1992 production is projected up slightly to 68,000 tons. Production for 1991 was up due to increased plantings to meet expanded foreign demand for flue-cured tobacco, the only major type grown. Mexican tobacco production for 1992 is projected at 70,000 tons, double the 1991 level, due to a 100-percent increase in planted area. In 1991, tobacco farmers who switched to alternate crops lost money, while those who planted tobacco made a profit. Private buyers offered farmers 12 percent higher prices for the 1992 crop for both burley and flue-cured tobacco. This caused large increases in planted area of these types.

Thailand is expected to increase production of tobacco by 16 percent, to 88,000 tons, because of increased plantings due to favorable farm prices. Korean production for 1992 is projected up slightly over 1991, assuming a return to more normal yields. Japanese tobacco production for 1992 is projected up about 4 percent, to 73,400 tons. The reduced 1991 crop was affected by excessive rain, below normal temperatures, and volcanic ash from Mount Unzen. Philippine production for 1992 is projected to increase 6 percent, to 84,000 tons, provided flue-cured and burley seedbeds damaged by typhoon Ruth can be replanted. If the beds cannot be replaced, production could fall to 65,000 tons.

Indian tobacco production for 1992 is projected at 521,000 tons, 9 percent over the 1991 production of 480,000 tons due to increased plantings. In Turkey, 1992 tobacco production is projected to fall 8 percent to 222,000 tons due to lower plantings as a result of reduced support prices.

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TABLE 18

TOBACCO PRODUCTION FOR SELECTED COUNTRIES

	Area (Hectares)		Farm Sales (Metric Tons)	
	1991	1992	1991	1992
Argentina	64,610	79,725	94,443	130,350
Brazil	291,000	310,000	419,000	505,000
Canada	30,340	31,640	67,740	68,000
China	1,565,000	1,578,000	2,482,500	2,563,000
India	389,192	437,700	479,500	521,000
Japan	29,408	27,300	70,900	73,400
Malawi	117,100	121,500	125,360	130,300
Mexico	17,739	34,300	35,430	69,650
Philippines	52,831	56,775	78,832	83,830
South Africa	24,175	24,300	33,851	36,075
South Korea	30,671	30,700	69,441	69,556
Spain	24,050	25,000	52,705	54,690
Thailand	61,820	67,200	75,428	87,780
Turkey	260,850	240,850	242,624	221,824
Zimbabwe	71,720	86,270	177,957	201,060
TOTAL	3,030,506	3,151,260	4,505,711	4,815,515

December 1991 Production Estimates and Crop Assessment Division, FAS, USDA

WORLD COFFEE PRODUCTION

World 1991/92 green coffee production is estimated at 101.1 million 60-kilogram bags, down slightly from the 101.2 million harvested last year, but up 1 percent from the first forecast made in June (see Circular Series WAP 6-91). South American production is estimated at 48.3 million bags, down 3 percent from last year, but up 2 percent from the June forecast of 47.6 million bags. If realized, this region will account for 48 percent of the world's 1991/92 coffee output. African coffee outturn is estimated to be up 3 percent over last season and 4 percent above the June forecast. Asian coffee output is expected to be up 3 percent from last season, but down 3 percent from June. The estimate for the North and Central America regions for 1991/92, including the Caribbean, is up 4 percent from 1990/91 and 1 percent above the June forecast. The 1991/92 estimate is 2 percent below the record 1987/88 harvest of 103.2 million bags.

Brazil, the world's largest producer, harvested a crop of 28.5 million bags in 1991/92, up 500,000 from the June forecast, but 8 percent less than last year's 31.0 million bag crop. For 1991/92, Brazil's planted area of about 3.5 million hectares, or 4.2 million trees, is estimated to have increased slightly from a year ago. However, current projections indicate Brazil's harvest will be well below potential because weather conditions, combined with poor management practices, impeded the optimal development of the crop. A survey of coffee dehusking yields for the 1991/92 crop indicated they were near normal, falling within a range of 18 to 21.5 kilograms of de-husked coffee from a 40-kilogram bag of dried coffee cherries. Production, in millions of 60-kilogram bags, by producing state for the 1991/92 crop is estimated as follows: Parana 2.0; Sao Paulo 4.5; Minas Gerais 13.5; Espirito Santo 5.5; and other states 3.0.

In Colombia, coffee production for 1991/92 is estimated at a record 15.0 million bags, up 500,000 from the June forecast and the 1990/91 estimate. The expected rise from a year earlier is attributed to a 2-percent increase in area harvested. The expansion of coffee area has occurred steadily throughout the decade of the 1980's and appears likely to continue at least through the first half of the 1990's. Colombia currently has a coffee tree population of approximately 4.0 billion, up 2 percent from last year. Two coffee diseases still concern coffee authorities and growers in Colombia. Coffee rust has been a problem to growers since late 1983. Concern over coffee rust has intensified because the Coffee Growers Federation (CGF) eliminated its direct subsidization of coffee rust control in 1989. Prior to that time, CGF gave growers money to pay the additional labor costs involved in controlling the disease, as well as selling fungicide at subsidized prices. Currently, the CGF pays farmers a little more for their coffee and expects them to use the additional income to control coffee rust. Another menacing coffee disease is "broca". It first appeared in Colombia during 1988 in an unimportant coffee area near the border with Ecuador. From there, it spread to other coffee areas in the departments of Huila, Cauca, and Valle del Cauca, an important producing region. In November 1990, broca was discovered in Risaralda, the heart of Colombia's most significant coffee producing region. The CGF and the Colombian Agricultural Institute are continuing to conduct educational campaigns to instruct farmers on methods of preventing and eradicating broca.

In Indonesia, 1991/92 coffee production is estimated at 6.8 million bags, down 100,000 from the June forecast and 450,000 less than last year. The smaller output resulted from a combination of reduced harvested area and the lingering effects of drought throughout most of the major production areas. Unusually dry conditions reduced both yields and bean quality. Although Indonesia's total coffee tree population is expected to be up slightly from a year ago, to 1.3 billion, the Government's coffee production policy remains focused on rehabilitation and intensification of existing plantations rather than on further expansion.

Mexico's coffee production in 1991/92 is estimated at 4.8 million bags, 300,000 more than the June forecast and 1990/91. The upward revision reflects a significant recovery of coffee trees in the state of Puebla that were severely damaged by freezing temperatures in December 1989. Preliminary reports indicate adequate rainfall and good flowerings occurred in the main producing areas. This more than offset a 2-percent decline in Mexico's total coffee tree population, currently estimated at 850.0 million. Nearly one-half of Mexico's small coffee growers continue to receive support from INMECAFE, the National Solidarity Program (PRONASOL), and Mexico's government coffee marketing agency. Growers are provided subsidized production credits to expand coffee production. However, low international coffee prices are forcing many growers to reduce cultural practices and input utilization in order to trim production costs. Many producers farming in low-yielding areas are abandoning coffee production altogether, while maintenance and management practices are deteriorating in other areas. With reduced cultural practices, it is expected that production and yield differences between "on" and "off-year" cycles will be more noticeable over the next several years. A severe outbreak of "broca" infestation occurred last season on 20,000 hectares in Oaxaca. Broca was only found in Chiapas a few years ago, but because of the declining emphasis on cultural practices, coffee rust and broca currently infest about 80,000 hectares in Chiapas.

In Cote d'Ivoire, 1991/92 coffee production is estimated at 4.5 million bags, unchanged from the June forecast, but up 12 percent from the revised 1990/91 estimate of 4.0 million bags. The total coffee tree population remains virtually unchanged from a year ago at 1.8 billion trees. The projected production increase is due to a return to near-normal weather and actions taken by the Government of Cote d'Ivoire (GOCI) to liberalize marketing of the 1991/92 coffee crop. One of the Government's most important actions to liberalize coffee marketing entailed removing restrictions that prohibited farmers from de-hulling coffee cherries. The removal of these restrictions eased the farmers' discontent with de-hulling factories that stemmed from a widespread belief that factories were using quality control to unfairly lower purchase prices. In other measures, the GOCI no longer requires governmental approval for purchasing agents. Further, exporters are able to appoint as many agents as necessary who can buy unlimited quantities of beans, from any area, without restrictions on the amount that can be exported. The Government will maintain the same producer prices, quality premiums, and discounts for 1991/92 as in the previous year.

Ethiopia's 1991/92 coffee outturn is estimated at 3.5 million bags, 17 percent above the June forecast and the same as in 1990/91. For the past five years, the Ethiopian Government has estimated the coffee area at 321,000 hectares. According to the 1991/92 plan, coffee plantation area is projected to increase to 364,000 hectares, up 13 percent. Most of the area expansion is projected for state-farms. However, there remain major production constraints including the age of trees, coffee berry disease, insufficient support services, inadequate producer incentives, inefficient institutional arrangements, infrastructure-related problems, and lack of farmer participation in decision-making and implementation of relevant agricultural policies. Currently, Ethiopia is undergoing rapid political change. It is likely that any future Government will pursue a liberalized, deregulated coffee policy.

India's 1991/92 coffee production is estimated at 3.4 million bags, 100,000 less than previously forecast, but 430,000 more than produced in 1990/91. The decline from the June number was mainly due to severe late-season rains that marginally cut yields. However, in the major producing state of Karnataka, berry loss, due to heavy rains, has been minimal. Also, the incidence of the berry-borer pest has been limited to a few plantations around the Karnataka-Tamil Nadu border. It appeared for the first time in India last season. The pest bores through coffee seeds, and can damage up to 90 percent of a coffee crop. It has caused great losses in various Central African countries and in Sri Lanka.

Guatemala's 1991/92 coffee production is estimated at 3.2 million bags, down 6 percent from the June estimate and 1 percent below 1990/91. Because Guatemala's coffee tree population remains unchanged at about 700.0 million trees, the reduction primarily reflects declining fertilizer use by some producers as well as minor losses due to the recent drought. High production costs and low returns are expected to cause adjustments within the industry. Many producers may attempt to lower variable costs of production by further reducing fertilizer applications and moderating other cultural practices. The full effect of these adjustments will not be seen until the 1992/93 crop.

Uganda's 1991/92 coffee production is estimated at 3.0 million bags, unchanged from June, but up 300,000 from last year's outturn. The Ugandan Government began its coffee reform program in earnest during the 1990/91 season. Since July 1990, export competition was introduced, the Coffee Marketing Board restructured, the Crop Finance System was brought under control, and a new regulatory body was formed. These reforms have improved producer prices and dramatically improved robusta coffee quality. Uganda produces mostly robusta coffee from small holdings throughout the central part of the country, reaching from the slopes of Mount Elgon in the east, to the Nile in the northwest, and to Kigezi in the southwest.

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TABLE 19

GREEN COFFEE: TOTAL PRODUCTION IN SELECTED COUNTRIES

(1,000 60-Kg Bags) 1/

Region and Country	1988/89	1989/90	1990/91	1991/92 June	1991/92 Dec 2/
NORTH AMERICA					
Costa Rica	2,758	2,453	2,565	2,680	2,680
Cuba	450	475	480	480	480
Dominican Republic	726	756	608	725	725
El Salvador	1,492	2,787	2,402	2,500	2,400
Guatemala	3,022	3,472	3,282	3,440	3,250
Haiti	479	527	580	600	600
Honduras	1,635	1,928	1,685	1,665	1,800
Jamaica & Dep	14	19	26	30	30
Mexico	5,500	5,100	4,550	4,550	4,850
Nicaragua	714	743	454	500	580
Panama	200	220	260	260	260
Trinidad and Tobago	20	15	15	15	15
United States 3/	254	279	285	285	290
TOTAL	17,264	18,774	17,192	17,730	17,960
SOUTH AMERICA					
Bolivia	195	258	342	350	350
Brazil	25,000	26,000	31,000	28,000	28,500
Colombia	10,700	13,300	14,500	14,500	15,000
Ecuador	2,150	2,150	1,850	1,900	1,800
Guyana	5	5	5	5	5
Paraguay	410	430	340	400	400
Peru	1,400	1,400	1,150	1,300	1,150
Venezuela	1,127	1,075	843	1,100	1,100
TOTAL	40,987	44,618	50,030	47,555	48,305
AFRICA					
Angola	200	170	170	170	170
Benin	40	35	35	35	35
Burundi	605	616	517	550	550
Cameroon	1,760	1,440	1,365	970	990
Central African Rep.	355	300	350	350	350
Congo	25	25	25	25	25
Cote d'Ivoire	3,989	4,734	4,000	4,500	4,500
Equatorial Guinea	15	15	15	15	15
Ethiopia	3,300	3,400	3,500	3,000	3,500
Gabon	35	30	30	30	30
Ghana	17	17	35	35	35
Guinea	100	125	125	125	125
Kenya	1,960	1,740	1,502	1,600	1,650
Liberia	82	40	30	30	30
Madagascar	1,100	1,100	1,100	1,000	1,150
Malawi	72	95	90	90	90
Nigeria	90	95	90	90	90
Rwanda	679	561	619	660	660
Sierra Leone	92	100	100	100	100
Tanzania	957	851	830	820	820
Togo	300	300	300	300	300
Uganda	3,300	2,500	2,700	3,000	3,000
Zaire	1,750	2,000	1,695	1,640	1,640
Zambia	10	15	15	15	15
Zimbabwe	175	225	225	225	225
TOTAL	21,008	20,529	19,463	19,375	20,095
ASIA					
India	3,590	2,150	2,970	3,500	3,400
Indonesia	6,750	7,100	7,250	6,900	6,800
Malaysia	75	75	75	75	75
Philippines	1,350	1,149	970	1,300	1,100
Sri Lanka	75	70	75	75	75
Thailand	1,025	800	900	1,000	1,000
Vietnam	922	985	1,200	1,350	1,350
Yemen	65	65	65	65	65
TOTAL	13,852	12,394	13,505	14,265	13,865
OCEANIA					
New Caledonia	6	5	5	5	5
Papua New Guinea	1,175	1,092	964	1,000	825
TOTAL	1,181	1,097	969	1,005	830
WORLD TOTAL	94,292	97,412	101,159	99,930	101,055

1/ One bag = 132.276 pounds.
2/ Coffee marketing year begins October in some countries and April or July in others.
3/ Includes Puerto Rico and Hawaii.

NOTE: Production estimates for some countries include cross-border movements.

December 1991 Production Estimates and Crop Assessment Division, FAS, USDA

CITRUS PRODUCTION SITUATION FOR 1990/91 AND 1991/92

Commercial citrus production in selected major producing countries for 1990/91 is estimated at 49.0 million tons, up 1 percent from June 1991 and 2 percent over 1989/90. Northern Hemisphere 1991/92 production is forecast at 32.0 million tons, down 1 percent from the revised 1990/91 production of 32.3 million tons. Forecasts for 1991/92 show gains by only three major producers -- the United States, Italy, and Turkey -- but these increases are not large enough to offset declines in Spain, Mexico, Greece, Israel, Morocco, and Japan.

Preliminary forecasts for 1991/92 indicate Northern Hemisphere countries will decrease production of all major citrus crops. Oranges are off 1 percent to 19.5 million tons, tangerine production is down by 4 percent to 5.3 million, grapefruit output is expected to fall 5 percent to 2.9 million, and lemons will drop 2 percent to 2.5 million. Production of other types of citrus is expected to remain unchanged at 1.5 million tons.

Citrus production in the United States for 1991/92 is projected up 4 percent to 10.7 million tons. Production was expected to be higher because initial assessments indicated a substantial recovery from the 1990 freeze in California and a normal crop in Florida; however, this did not happen. The Florida orange and grapefruit crops were below expectations due to below normal fruit setting caused by unfavorable weather last spring. Orange production for 1991/92 is projected at 7.8 million tons, up 7 percent over last year due to the recovery in California, where output is expected to be double the 1990/91 freeze-damaged crop. The Florida orange crop, which normally accounts for three-quarters of domestic production, is estimated down by 10 percent. Grapefruit is projected down 5 percent because of the smaller Florida crop. Trees in Texas are expected to produce only a small commercial crop in 1991/92. The entire 1990/91 crop was lost during the 1989/90 freeze.

Mexican citrus production for 1991/92 is projected at 3.3 million tons, down 7 percent from 1990/91 because of unfavorable weather during the first, and most important, flowering period last season.

The Spanish citrus production estimate for 1990/91 has been revised to 4.7 million tons, up slightly from the June projection. The 1991/92 crop is estimated at 4.4 million tons, down 7 percent from 1990/91. A cold spring caused fruit-set to be below normal and the unusually hot summer resulted in above normal fruit drop. Orange production for 1991/92 is forecast at 2.5 million tons, down 3 percent from the 1990/91 level. Tangerine production is forecast at 1.3 million tons, down 12 percent from the 1990/91 level. Lemon production for 1991/92 is forecast at 527,000 tons, down 15 percent from the revised 1990/91 crop of 620,000 tons.

Greek citrus production for 1990/91 is estimated at 1.1 million tons, unchanged from the June projection. For 1991/92, production is forecast to fall 12 percent to 939,000 tons due to a second consecutive year of drought. Orange production for 1991/92 is forecast at 703,000 tons, down 14 percent from 1990/91; while, lemon production is forecast at 150,000 tons, down 11 percent from 1990/91. These projected reductions reflect drought and freeze damage during blossoming. In some orange groves, production was down 50 percent. In contrast, tangerine production is forecast up slightly to 75,000 tons because of that crop's greater cold tolerance.

Italian citrus production for 1990/91 is forecast at 2.9 million tons, down slightly from the June estimate. For 1991/92, production is projected at over 3.2 million tons because of improved weather conditions. Orange production for 1991/92 is projected at 2.0 million tons, up 4 percent from 1990/91. Tangerine production is projected up 12 percent from 1990/91 to 0.5 million tons and lemon production is projected up 10 percent from 1990/91 to 0.7 million tons.

Japanese citrus production for 1991/92 is forecast to fall 4 percent to 2.1 million tons due to a September typhoon that caused serious damage. The 1991/92 tangerine crop (90 percent of all Japanese citrus production) is in an "on year" for this alternate bearing crop, but the storm drastically cut expected yields.

Israeli citrus production for 1991/92 is forecast at 1.0 million tons, 9 percent below last year's revised production of 1.1 million. The 40-percent reduction in water quotas for fruit orchards since September 1990 has forced growers to concentrate on more valuable products, like pink grapefruit, and reduce irrigation on less productive groves.

Egyptian citrus for 1991/92 is forecast at 2.3 million tons, up slightly from the revised 1990/91 estimate. The 1990/1991 crop was revised upward because of an increase in harvested area and yields. Gaza citrus production for 1991/92 is forecast at 142,000 tons, up slightly from the revised 1990/91 crop of 137,000.

For Morocco, 1991/92 production is forecast down about 25 percent to 1.1 million tons, from a revised 1990/91 crop of 1.5 million due to a sharp drop in orange production. The decline for 1991/92 occurred because of the large 1990/91 crop, cold weather in the March blossoming period, and high fruit drop during April, May, and June because of high temperatures. Orange production is forecast down 28 percent to 790,000 tons, while tangerines are down 8 percent to 284,000 tons.

Turkey's 1991/92 citrus crop is forecast at 1.6 million tons, up 9 percent from a revised 1990/91 crop of 1.5 million tons. Production for all citrus is projected to increase, except for tangerines that were affected by heavy rains during blossoming. In Cyprus, both the 1991/92 citrus crop and revised estimates for 1990/91 are down slightly due to continued drought.

The Southern Hemisphere 1990/91 citrus crop has been revised downward slightly since June, to 16.7 million tons. The downward revisions are due to reduced orange production in Argentina and all citrus types in South Africa.

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TABLE 20

CITRUS PRODUCTION
(1,000 METRIC TONS)

	1987/88	1988/89	1989/90	1990/91	1991/92 1/
CUBA					
Oranges	508	474	604	600	600
Tangerines	25	26	17	15	15
Grapefruit	285	385	264	332	332
Citrus, other	80	62	69	66	66
TOTAL	898	947	954	1,013	1,013
CYPRUS					
Oranges	138	170	223	174	173
Tangerines	6	11	12	12	10
Grapefruit	96	115	118	118	100
Lemons	46	63	66	54	50
TOTAL	286	359	419	358	333
EGYPT					
Oranges	1,387	1,199	1,397	1,574	1,600
Tangerines	134	151	170	257	265
Grapefruit	2	2	2	2	2
Lemons	2	2	2	2	2
Citrus, other	138	190	240	410	420
TOTAL	1,663	1,544	1,811	2,245	2,289
GAZA STRIP					
Oranges	83	98	171	116	120
Grapefruit	10	14	13	11	12
Lemons	12	13	13	10	10
TOTAL	105	125	197	137	142
GREECE					
Oranges	462	770	932	819	703
Tangerines	49	69	75	74	75
Grapefruit	5	6	7	7	7
Lemons	89	170	189	169	150
Citrus, other	3	4	4	4	4
TOTAL	608	1,019	1,207	1,073	939
ISRAEL					
Oranges	627	546	877	567	550
Tangerines	122	90	127	92	97
Grapefruit	314	353	373	384	317
Lemons	47	37	40	36	37
Citrus, other	14	16	25	25	25
TOTAL	1,124	1,042	1,442	1,104	1,026
ITALY					
Oranges	1,343	2,170	2,067	1,820	2,000
Tangerines	333	411	476	445	500
Grapefruit	3	7	8	7	9
Lemons	592	708	667	620	680
Citrus, other	42	18	38	39	40
TOTAL	2,313	3,314	3,256	2,931	3,229
JAPAN					
Oranges	67	58	54	50	43
Tangerines	2,941	2,387	2,375	1,993	1,915
Lemons	2	2	2	2	2
Citrus, other	288	227	201	170	160
TOTAL	3,298	2,674	2,632	2,215	2,120

FOOTNOTES AT END OF TABLE CONTINUED

December 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 20 (Continued)

CITRUS PRODUCTION
(1,000 METRIC TONS)

	1987/88	1988/89	1989/90	1990/91	1991/92 1/
MEXICO					
Oranges	1,900	2,000	1,900	2,300	2,050
Tangerines	151	157	169	170	165
Grapefruit	105	75	95	100	110
Lemons	9	9	7	5	5
Citrus, other	672	680	680	700	714
TOTAL	2,837	2,921	2,851	3,275	3,044
MOROCCO					
Oranges	891	994	775	1,103	790
Tangerines	303	420	223	311	284
Grapefruit	4	4	4	4	4
Lemons	20	21	20	20	20
Citrus, other	16	12	28	30	30
TOTAL	1,234	1,451	1,050	1,468	1,128
SPAIN					
Oranges	2,442	2,216	2,400	2,565	2,490
Tangerines	1,307	1,260	1,084	1,510	1,330
Grapefruit	18	22	22	20	21
Lemons	760	733	660	620	527
Citrus, other	16	15	13	12	13
TOTAL	4,543	4,246	4,179	4,727	4,381
TURKEY					
Oranges	700	740	740	735	850
Tangerines	280	310	336	345	320
Grapefruit	27	30	28	37	40
Lemons	220	300	335	360	400
Citrus, other	5	5	4	4	4
TOTAL	1,232	1,385	1,443	1,481	1,614
UNITED STATES					
Oranges	7,903	8,272	7,083	7,258	7,774
Tangerines	369	372	269	257	288
Grapefruit	2,541	2,580	1,795	2,046	1,949
Lemons	712	689	640	655	624
Citrus, other	52	50	65	58	58
TOTAL	11,577	11,963	9,852	10,274	10,693
TOTAL NORTHERN HEMISPHERE					
Oranges	18,451	19,707	19,223	19,681	19,743
Tangerines	6,020	5,664	5,333	5,481	5,264
Grapefruit	3,410	3,593	2,729	3,068	2,903
Lemons	2,511	2,747	2,641	2,553	2,507
Citrus, other	1,326	1,279	1,367	1,518	1,534
TOTAL	31,718	32,990	31,293	32,301	31,951
SOUTHERN HEMISPHERE					
ARGENTINA					
Oranges	650	620	750	740	N/A
Tangerines	283	290	250	240	N/A
Grapefruit	176	155	190	180	N/A
Lemons	517	350	380	430	N/A
TOTAL	1,626	1,415	1,570	1,590	N/A
AUSTRALIA 2/					
Oranges	394	544	480	559	N/A
Tangerines	39	40	43	46	N/A
Grapefruit	30	33	30	32	N/A
Lemons	35	32	31	31	N/A
TOTAL	498	649	584	668	N/A

FOOTNOTES AT END OF TABLE

CONTINUED

December 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 20 (Continued)

CITRUS PRODUCTION
(1,000 Metric Tons)

	1987/88	1988/89	1989/90	1990/91	1991/92 1/
BRAZIL					
Oranges	10,400	14,150	11,950	11,950	N/A
Tangerines	453	570	592	570	N/A
Grapefruit	24	25	25	25	N/A
Lemons	50	54	53	53	N/A
Citrus, other	512	571	592	590	N/A
TOTAL	11,439	15,370	13,212	13,188	N/A
CHILE 2/					
Oranges	120	115	115	116	N/A
Lemons	80	85	74	76	N/A
TOTAL	200	200	189	192	N/A
SOUTH AFRICA, REPUBLIC OF					
Oranges	681	629	697	689	N/A
Grapefruit	134	135	111	127	N/A
Lemons	65	61	55	64	N/A
TOTAL	880	825	863	880	N/A
URUGUAY 2/					
Oranges	68	70	82	121	N/A
Tangerines	35	37	49	53	N/A
Grapefruit	8	8	23	10	N/A
Lemons	54	54	51	42	N/A
TOTAL	165	169	205	226	N/A
TOTAL SOUTHERN HEMISPHERE					
Oranges	12,313	16,128	14,074	14,175	N/A
Tangerines	810	937	934	909	N/A
Grapefruit	372	356	379	374	N/A
Lemons	801	636	644	696	N/A
Citrus, other	512	571	592	590	N/A
TOTAL	14,808	18,628	16,623	16,744	N/A
GRAND TOTAL					
Oranges	30,764	35,835	33,297	33,856	N/A
Tangerines	6,830	6,601	6,267	6,390	N/A
Grapefruit	3,782	3,949	3,108	3,442	N/A
Lemons	3,312	3,383	3,285	3,249	N/A
Citrus, other	1,838	1,850	1,959	2,108	N/A
TOTAL	46,526	51,618	47,916	49,045	N/A

1/ December 1991 Estimate unless otherwise noted. 2/ Estimate previously reported.

December 1991 Production Estimates and Crop Assessment Division, FAS, USDA

MONGOLIAN AGRICULTURAL SITUATION

Mongolia is a large, landlocked, and thinly-populated country located between China and the Soviet Union. Larger than Alaska, its terrain is mostly flat and rolling semi-arid grasslands framed by mountains in the west and southwest and the Gobi Desert in the southeast. It has a continental climate with sharp seasonal variations and extremely cold winters. The majority of Mongolia's 2 million people are engaged in agricultural production -- mainly livestock, wheat, oats, barley, and potatoes. The rural population is generally self-sufficient, but, for many years, the expanding urban population has depended upon a socialist distribution system for all of their food. Since 1990, Mongolia has taken several steps toward building a market-oriented economy, but the transition has been difficult, especially in the agricultural sector.

LIVESTOCK AND DAIRY PRODUCTS

Meat and dairy products, along with bread, form the basis of the traditional Mongolian diet. Mongolia has roughly 25 million head of livestock (about 60 percent sheep), including 9.3 million born in 1991. Legal limits on individual livestock ownership were abolished in June 1990 and now 30-40 percent of all animals are privately owned. Dairy farm privatization is scheduled for the end of 1991. Although these changes are expected to strengthen the livestock sector in the long-run, many rural Mongolians are opposed to private ownership because they fear the economy is too unstable or that their interests could be hurt under the new system.

Despite the large number of animals, there was a shortage of meat for urban consumers this year because of a breakdown in the movement of meat and livestock to market. According to Mongolian government statistics, meat production for the first-quarter of 1991 was only 35 percent of first-quarter 1990 production and serious meat shortages were reported in major cities during the summer. Livestock slaughtering normally increases in the fall, but many herders refused to sell their stock this year because of low procurement prices and the lack of consumer goods available for purchase with the receipts. Meanwhile, forecasts of severe weather this winter led herders to keep inventories high in order to absorb the expected winter losses. Fodder supplies are short in the north and west where livestock retention is highest, so the result could be higher animal losses and severe meat shortages in the spring.

Milk supplies are also short this year. In August, the Mongolian State Statistical Bureau reported that milk production in the first-half of 1991 was just 80 percent of 1990 levels (17.6 verses 21.9 million liters). Suppliers blamed dairies for under-producing, while dairies blamed inadequate storage and transport facilities for the decline. The situation does not seem likely to improve soon.

GRAINS

Mongolia's grain crop (primarily spring wheat, with lesser amounts of barley and oats) is grown in the river valleys in the northern part of the country. Mongolia's farmers originally planned to sow 619,000 hectares of wheat in 1991, but actual sown area was probably closer to 500,000 hectares because of poor weather at planting. In July, Mongolian authorities estimated wheat production at 736,000 to 750,000 tons, but summer drought and the lack of fertilizer, pesticides, and herbicides caused a reduction in yields. Rain, early frost, and shortages of labor and materials delayed the harvest and hurt crop quality. By the end of October, the wheat estimate was reduced to 625,000 tons, but the final estimate put total production at only 590,000, down 25 percent from the target of 790,000. Production of potatoes, vegetables, and grains are also expected to fall below Government targets. Post-harvest losses are normally serious since grains and vegetables usually are transported without protection from the elements and stored without proper drying. One expert estimated that 40 percent of potatoes and up to 60 percent of other vegetables and fruits are lost in storage.

CURRENT ECONOMIC CONDITIONS

Reportedly, Mongolia is now in the midst of a food crisis, the result of fundamental economic changes caused by the shift to a market economy in 1990. As in some other centrally-planned economies, the former socialist administration has largely disintegrated but few free market mechanisms have emerged to take their place. The Mongolian economy is in poor shape. Domestic production is falling, businesses are closing, and unemployment is rising. A lack of hard currency and the collapse of barter trade with its neighbors has seriously affected both exports of Mongolian commodities and imports of vitally needed items such as food, fuel, and fertilizer. Imports of consumer goods and food in 1991 are down sharply from last year. Local governments are now responsible for managing the harvest, but with no clear direction from the Central Government, food is not getting to where it is most needed. In recent months, the country has sought emergency food aid from the United States and other donor countries, but Mongolia's isolation and economic problems have made the delivery of aid difficult.

Since last January, the Government has been forced to impose rationing on meat, butter, cooking oil, rice, sugar, tea, flour, vodka, and soap. However, rationed goods are in short supply and often insufficient to fulfill the basic minimum needs. The meat ration is only 90 grams/day per person, much lower than normal consumption. Sugar and rice are disappearing from the market. Cooking oil has been in short supply since this summer, and even the supply of non-rationed food, like milk, is said to be inadequate. Per capita consumption of food fell last year. Mongolians now eat about one-third of the meat and sugar, 60 percent of the flour, and less than one-half of the rice they consumed 2 years ago. Senior Mongolian officials have said they believe supplies of meat, milk, and bread should be adequate for the winter, but the future is uncertain. Although they anticipate that the transition to a market-oriented economy will eventually improve Mongolia's agricultural sector, food shortages and distribution problems are not expected to disappear.

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